kiteworks™
by Accellion

Mobile App User's Guide: Windows Phone 8.1

February 2015

Copyright © 2015 Accellion, Inc. All rights reserved.

These products, documents, and materials are protected by copyright law and distributed under licenses restricting use, copying, distribution, and decompilation.

Accellion, the Accellion logo, and **kite**works are registered trademarks of Accellion, Inc. **kite**works is a trademark of Accellion. All other trademarks are properties of their respective owners.

Corporate Headquarters

Accellion
1804 Embarcadero Road, Suite 200
Palo Alto, CA 94303, USA

Contact Us

p. 1.650.485.4300 | f. 1.650.485.4308
www.accellion.com

Table of Contents

Preface v

Welcome v
Audience v
What's New v
kiteworks Version 2015 Initial Release: February 2015 vi

Using kiteworks Windows Mobile App 7

Getting Started 7
Download and Install the Mobile App 7
Sign In 7
Create a PIN 8
Two-Factor Authentication 9
Getting Oriented: A Guided Tour 9
The Navigation Bar 10
Collaboration View: Where You Work 11
Collaborate 13
Manage Folders 14
Folder Basics 14
The Move Tray 15
Folder Actions 18
View Details 19
Manage People 20
Favorite 21
Create New 21
Create New Folder 22
Create New File 22
Add from Photos 22
Roles 23
Online Viewer 23
Manage Files 25
Locking Files 26
Add Comments, Tasks, and Versions 27
Comments 28

Tasks 29
Versions 31
Access Enterprise Content Stores (License-Enabled) 32
Settings 34
Reset PIN 34
User Photo 34
Logout 34
Build Number 35
Integrated Mobile Editor 35
Microsoft Word Files 35
Understanding the Screen 36
Top Menu Icons 37
Editing Text 38
Formatting Text 38
Microsoft Excel Files 39
Editing Cells 40
Formatting Cells 41
Microsoft PowerPoint Files 43
Navigation 43
Formatting Text 44
Objects 44
Insert Object 44
Edit Object 45
Portable Document Format 46
PDF Annotator Interface 46
Annotation List 48
Adding Annotations 49
Highlighting 50
Freestyle Line 50
Comment 50
Bookmarks 52
Resources 53

Appendix A: User Roles 55

Appendix B: Icons and Symbols 57

Preface

Welcome

At Accellion, enterprise security is our primary focus. Second to security is our commitment to business mobility. Whether you are sharing files within your organization, or collaborating with multiple teams across the globe, we are committed to providing you with the definitive platform for working with content securely. Welcome to **kite**works™.

The **kite**works solution gives you powerful and secure access to content wherever you are, so you can share with confidence. With **kite**works, you can work seamlessly from web browser, to desktop, to tablet and smartphone—and always be connected to your files.

The **kite**works Mobile App extends secure collaboration to your mobile device. The mobile app allows you to collaborate from your mobile device by providing secure access to files stored in **kite**works.

As a mobile app user, you can access files securely without a VPN. Accellion provides server-based security to enforce security policies from a central administrative dashboard. If a mobile device is lost or stolen, the administrator can immediately disable access to **kite**works and remotely wipe the device. Admins can also disable mobile access if business needs change.

As with all Accellion solutions, the administrator can access the folder activity logs to ensure that only authenticated users have access to secure folders. The administrator can also set an expiration date for files being accessed by mobile devices. Files saved on a mobile device are encrypted at rest until they are opened.

Accellion supports the **kite**works Mobile App on Windows phone 8.1 and above.

Audience

This documentation is intended for users of the **kite**works solution by Accellion.

What's New

Each release of the documentation tracks with the current version of the software.

kiteworks Version 2015 Initial Release: February 2015

Using kiteworks Windows Mobile App

Getting Started

The **kite**works Mobile app requires an authorized account on **kite**works. If you have not received a "Welcome" email with a Service URL and login information, contact your **kite**works system administrator.

Download and Install the Mobile App

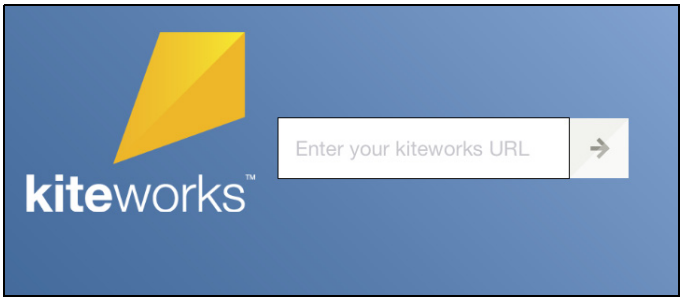
The **kite**works Mobile App is available at the Microsoft App Store.

When installed, tap the **kite**works icon on your mobile device to launch the app.

Sign In

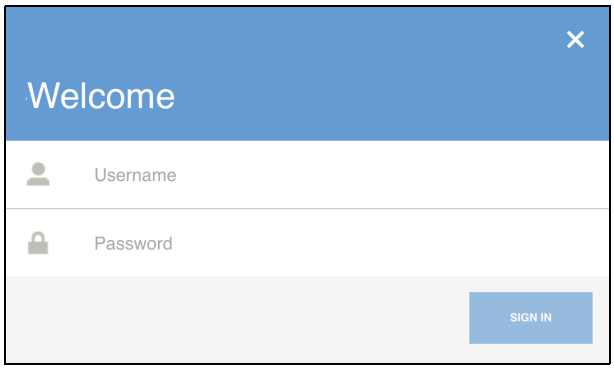
Before you sign in, open the "Welcome" email from Accellion where you will find the Service URL. Use this information to log in to the **kite**works Mobile app.

Note Your kiteworks Administrator may have personalized this landing page to your company's specifications. This document shows the defaults.



1 On the Settings (Sign In) page, enter the Service URL.

2 Tap the right arrow. A popup welcome window appears.



3 Enter your Username and Password.

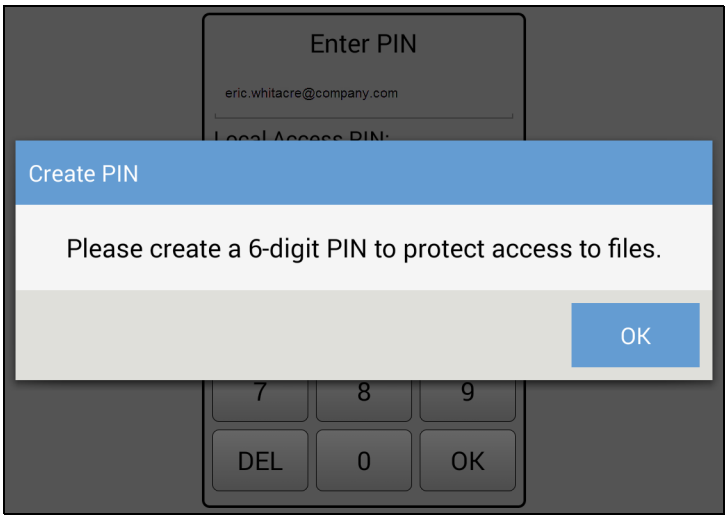
The **kite**works Mobile app requires an authorized account on **kite**works. If you have forgotten your login credentials, contact your IT department or **kite**works Administrator.

4 Tap **Sign In**.

Create a PIN

As a mobile app user, you can download files to your mobile device for use offline. The PIN prevents unauthorized access to files that have been downloaded. The frequency for PIN authorization is set by your **kite**works system administrator.

Note If your **kite**works administrator has configured the PIN to "Never Ask", you won't be prompted to create a PIN.



1 When you log in for the first time, you are prompted to create a PIN. Tap **OK**.

2 Enter a six-digit PIN.

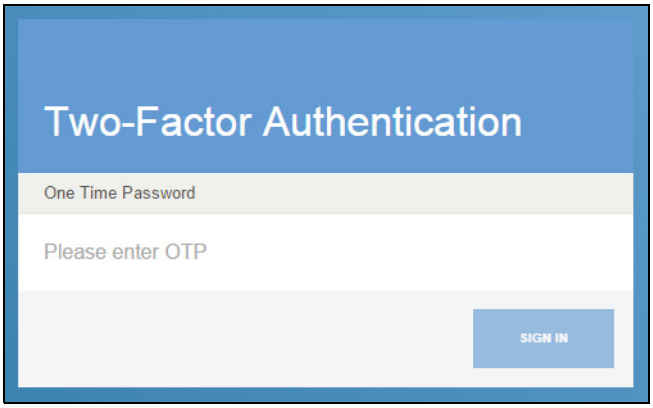
3 Tap **OK**.

To correct the PIN, tap **DEL**.

The mobile app opens.

Two-Factor Authentication

Two-Factor Authentication (2FA) is an Admin-enabled feature that gives an additional security step when users log in to **kite**works. 2FA enhances the regular authentication by adding a "possession factor" (something the user *has*, such as a token, SMS-based phone or device, or email connection) with a "knowledge factor" (something the user *knows*, such as a password) into the authentication process.



When you click Sign In, the Collaboration View appears (see Collaboration View: Where You Work).

Getting Oriented: A Guided Tour

The **kite**works mobile app shows you the collaboration screen with a navigation bar at the top or the left of the screen (depending on the orientation of the screen).

For a complete list of icons and their meanings, refer to Appendix B: Icons and Symbols.

The Navigation Bar

The navigation bar appears at the left of your screen. It is from this bar that you can navigate through **kite**works.

The default view is without the navigation bar visible. To view it, either tap the "≡" icon in the upper-left of the screen, or drag the screen to the right, so the bar becomes visible.

Table 1. The Navigation Bar

Icon (selected)	Description	Notes
	Folder	The default view, for creating, adding, sharing, and viewing files and folders; refer to Collaboration View: Where You Work.
	Shared Folders	Filters the list of folders to those folders that you have shared with other users.
	Favorites	Filters the list of folders to those folders and files that you have marked as Favorite.
	Move Tray	Opens The Move Tray screen.
	Help	Provides links to User's Guides, other information, and useful links.
	Settings	Allows you to either sign off or edit your current user settings; refer to Edit Settings.

For a complete list of icons and their meanings, refer to Appendix B: Icons and Symbols.

Collaboration View: Where You Work

The collaboration view indicates the folders and files to which you have access. When you first enter **kite**works, you are prompted to select your file location: **kite**works files or Access Enterprise Content Stores (License-Enabled).

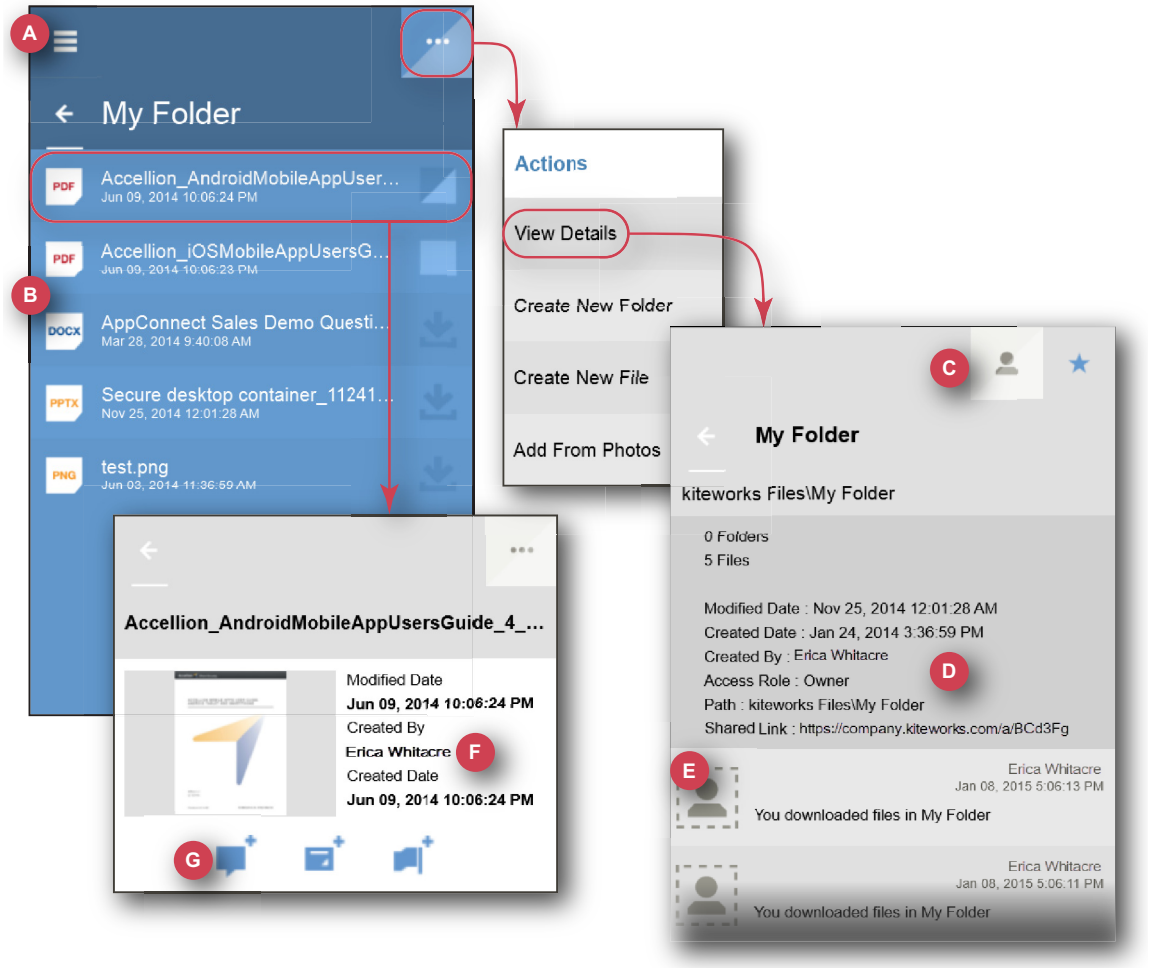


Table 2. Collaboration View

Icon	Description	Notes
A	Blue Bar Menu	Opens The Navigation Bar.
B	Folder and File List	Items listed can include icons to indicate the status of the file or folder, such as whether it is locked for editing, whether the file can be or is in the process of being downloaded or uploaded, or whether the file is out of date with other versions of the file.
C	Manage People and Favorite buttons	Allows users to view, and if they have the proper Roles, allows them manage those people who have access to the folder. Also indicates whether the folder has been marked as a “favorite” by you (blue indicates a favorite; if not a favorite, the star is empty).

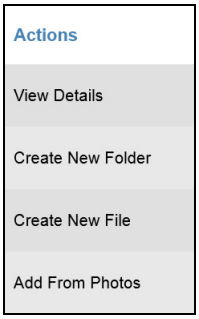
Table 2. Collaboration View

Icon	Description	Notes
E	Activity List	All of the activities that have occurred within the currently selected folder and by whom, including: • Comments made • Tasks assigned • Files downloaded or deleted • New versions of files uploaded • Changes to permissions and people added to access a folder • Folder marked/unmarked as a favorite
F	File Details	If a file is selected, the information panel includes a thumbnail of the file, and other details about the file.
G	File Information Icons	When selected, each icon shows comments, tasks, and versions (respectively) of the selected file.

Collaborate

You can collaborate with others in four distinct ways:

1 Manage Folders



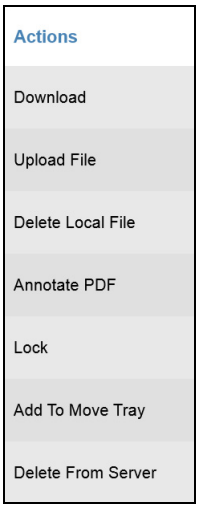
Sharing folders enables you to collaborate and share files with groups of people inside and outside of your organization. The process involves creating a folder, adding files to that folder, and then adding people to the folder, giving them access. The extent of their access is determined by you, the creator and manager. Permissions that you assign to others can range from being managers of those files (with the ability to add users, upload, download, lock, edit, and delete files), to only having the ability to view the files that exist in that folder.

For more details about roles, refer to Roles.

You can perform the following actions on and **folders**:

- View Details
- Create New Folder
- Create New File
- Add from Photos
- Manage People (using the "people" icon:)
- Mark as Favorite (using the "favorites" icon:)

2 Manage Files



Files in the kiteworks system are filed in the folders you specify. The actions you can perform on a file depends on whether the file has been downloaded to your device.

You can perform the following actions on **files**:

- Download/Upload
- Delete Local File
- Edit Content or Annotate PDF, depending on the file type, using the Integrated Mobile Editor
- Locking Files/Unlock Files
- Add to The Move Tray
- Delete From Server

3 Add Comments, Tasks, and Versions

Those people who have access to a shared folder in **kite**works can add a comment to the folder. Owners, Managers, and Collaborators can also assign tasks to other users based on the contents of a folder. These actions are performed by using the comments, tasks, and versions icons.

4 Access Enterprise Content Stores (License-Enabled)

With the Enterprise Connect feature enabled, **kite**works provides access to remote file shares and cloud storage solutions such as SharePoint, CIFS, Box, Google Drive, and Dropbox. Access to enterprise content stores is managed by your Accellion Administrator.

Manage Folders

Folders provide a secure location in which to collaborate with others. You can add different file types to a folder, organize the files into nested folders, and invite colleagues, clients or partners to join a folder.

Folder Basics

The Owner and Manager of a folder controls access to files inside the folder by assigning each participant a role, such as Downloader or Collaborator. The mobile app allows you to view and download files from a shared folder to your mobile device.

Table 3. Folder and File Icons

Icon	Description	Notes
	Left Arrow	Navigates back in folder hierarchy.
	Manage People	Allows you to invite people and change their roles.
	Actions	Opens a menu of actions you can perform on a folder; refer to Folder Actions.

Table 3. Folder and File Icons

Icon	Description	Notes
	Favorite	Indicates a folder is marked as a Favorite.
	Folder	Shows a Folder that can be shared or have files and folders added to it.
	Dark/Light Triangles	Indicates that the file has been edited on your device and not yet been uploaded. The file is out of sync.
	Light Square	Indicates that the file has been downloaded successfully to your device.
	Downward Arrow	Indicates that the file is not local has not yet been downloaded to your device.
	Lock	Indicates that a user has locked the file or folder for edits and no one can upload a new version of the file until it is unlocked; refer to Locking Files.
	Comments	When a file is selected, tap this icon to see all of the comments associated with the file or to add a comment to the file.
	Tasks	When a file is selected, tap this icon to see all of the tasks associated with the file or to add a task to the file.
	Versions	When a file is selected, tap this icon to see the version history of the file or to add a new version of the file.
	Information	Indicates an alert that a file did not upload or download as expected. Tap the icon for more information.
	Circled Checkmark	Indicates that the file is selected in The Move Tray.
	Circle Icon	Move Tray - for managing the locations of files and folders; refer to The Move Tray.
For a complete list of icons and their meanings, refer to Appendix B: Icons and Symbols.		

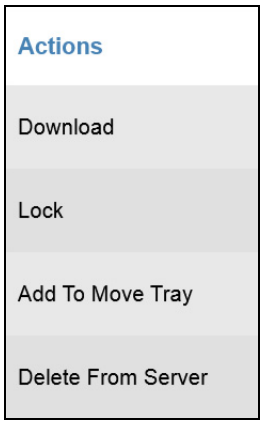
The Move Tray

The Move Tray is a staging area for moving files and folders within the **kite**works interface. You cannot drag and drop files directly from one folder to another, but you can put a file into the tray, and from the tray, move the file to its new location.

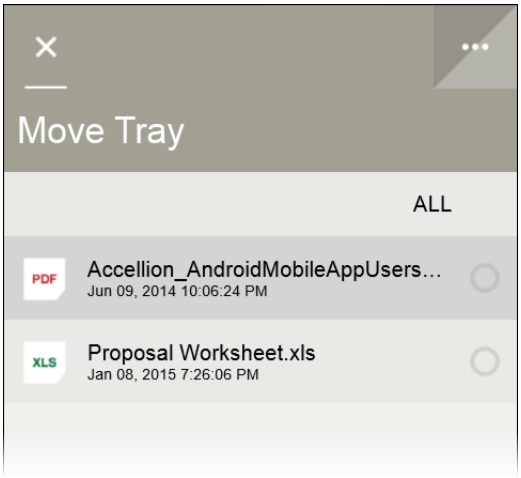
Note The contents of the Move Tray goes across the web interface and the mobile interface. Those files that you have put into the Move Tray from the web interface will also appear in the move tray on your device, and vice-versa.

To manage files using the Move Tray, perform the following steps.

1. Select the file that you would like to copy or move.
2. In the upper-right of the screen, tap the “Action” button. A menu of actions appear.



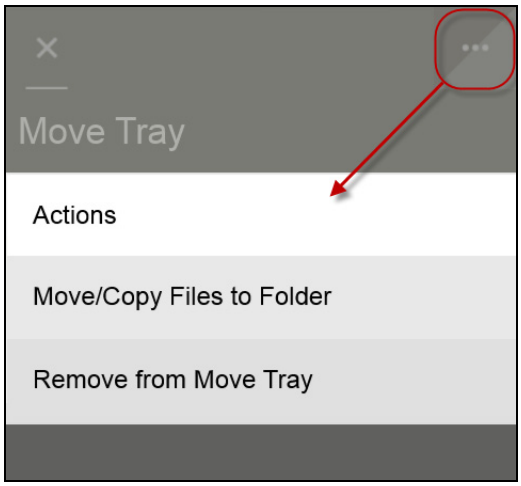
3. Tap **Add To Move Tray**. The file is added to the Move Tray.
4. Tap the “move tray” icon ( ) at the navigation bar. The Move Tray panel appears, with the files that you added to the Move Tray listed.



Note Any comments associated with the file are also moved with the file to the Move Tray. To view those comments, tap the file.

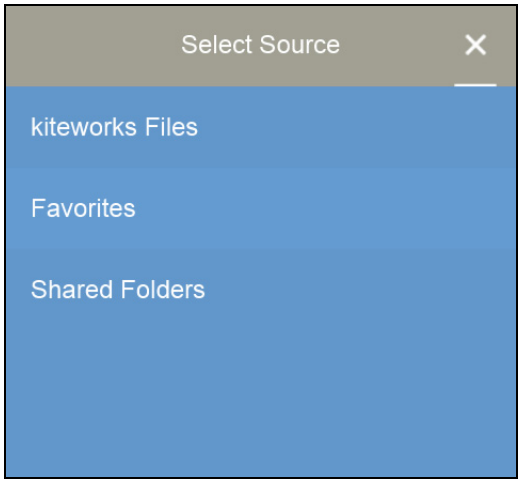
5. In the Move Tray, tap the circle to select the file to copy or move.

6 Tap the "..." button in the upper right corner. You are prompted to either Move/Copy to Folder, or Remove from Move Tray.



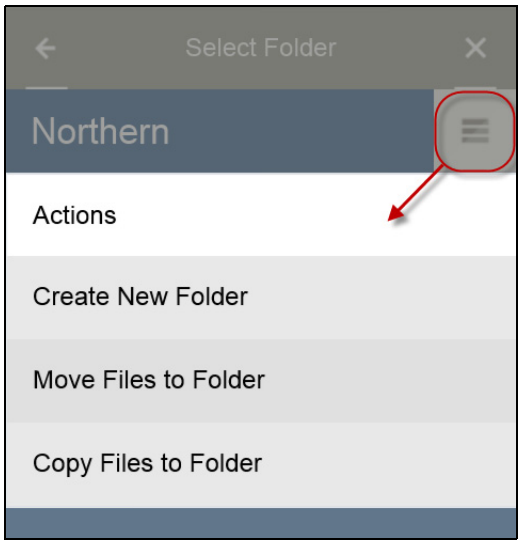
Note If you tap **Remove Files from Tray**, the file(s) are deleted from the Move Tray. You are not deleting the file(s) entirely; you are only deleting from the Move Tray itself.

7 Tap **Move/Copy Files to Folder**. You are then prompted to select a source (or location) to which the item should be moved or copied.



8 Navigate to the location to move or copy your files.

9 Tap the "three lines" button ( ). A menu of actions appear.

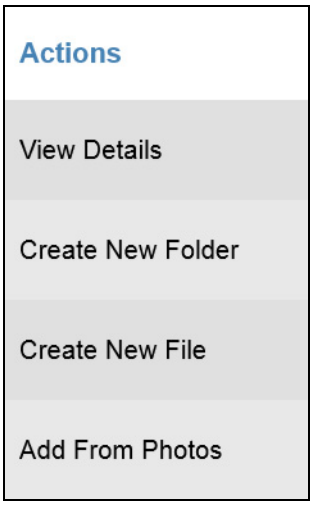


10 Tap the function you would like to perform.

- **Create New Folder.** Create New folder to which the item in the Move Tray should be moved or copied.
- **Move Files to Folder**: When you *move* a file to another folder, the file history and comments move with file. The file is deleted from tray *and* from its original location when the move is completed.
- **Copy Files to Folder:** When you *copy* a file to another folder, the copied file does *not* retain its history or comments. The original file stays in its current location *and* is copied to the selected location. It also remains in the Move Tray until you remove it.

Folder Actions

When you select a folder and tap the "..." icon, the following actions are available to you to perform.



From this menu, you can:

View Details

Create New Folder

Create New File

Add from Photos

View Details

When you view the details of a folder, you are have further actions that you can perform on the folder. Those actions are detailed below.

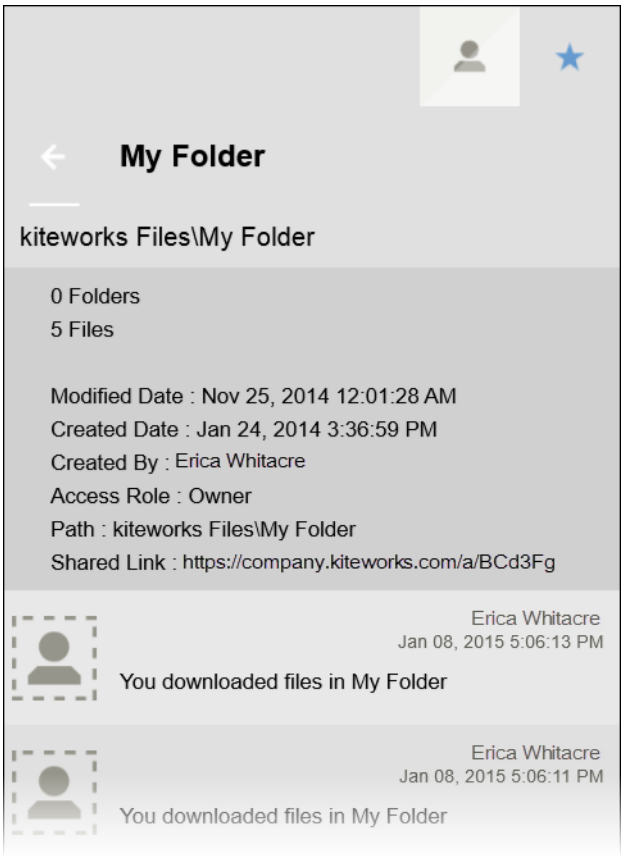

My Folder
kiteworks Files\My Folder
0 Folders
5 Files
Modified Date : Nov 25, 2014 12:01:28 AM
Created Date : Jan 24, 2014 3:36:59 PM
Created By : Erica Whitacre
Access Role : Owner
Path : kiteworks Files\My Folder
Shared Link : https://company.kiteworks.com/a/BCd3Fg
Erica Whitacre
Jan 08, 2015 5:06:13 PM
You downloaded files in My Folder
Erica Whitacre
Jan 08, 2015 5:06:11 PM
You downloaded files in My Folder

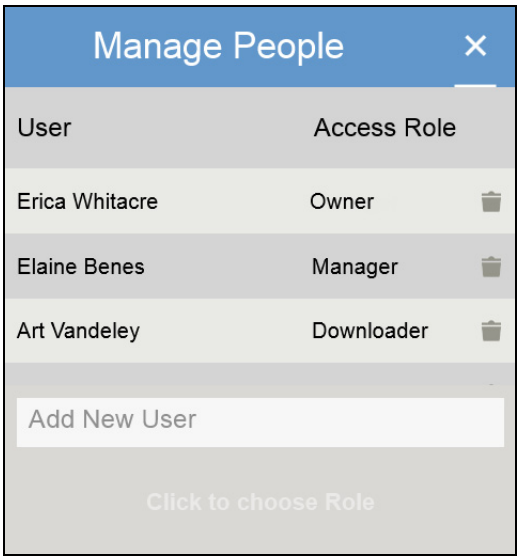
Table 4. Actions on Content in a Folder

Icon	Description	Notes
	Manage People	Allows the user to add, delete, or change access for others to access the folder; refer to Manage People.
	Favorite	Marks the folder as a Favorite, so it is easily found again using the navigation menu.
For a complete list of icons and their meanings, refer to Appendix B: Icons and Symbols.		

Manage People

Using this action, you can control who and at what level of access other collaborators have to the folder, and inviting new users to have access to that folder (or "share" the folder). This button appears when you select to view the Folder Details.

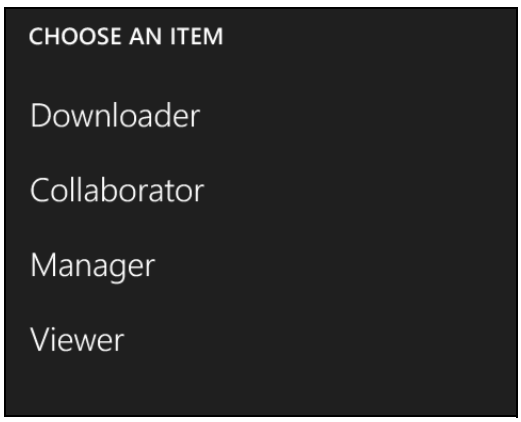
When you tap this button ( ), the following screen appears:



Note Users who have personalized their **kite**works settings to include a "friendly" name instead of an email address will have their friendly name listed, as above. If they have not personalized their **kite**works settings, their email address (or username) listed.

To add a new user to collaborate on the content of a folder, perform the following steps.

1. Tap in the **Add New User** field at the bottom of the list of people.
2. Type the user's email address in the field at the bottom of the window.
3. Tap **Click to Choose Role**. (If this button is not visible, as above, close the keyboard to see the button.) The Roles options appear. (For more information about roles, refer to Appendix A: User Roles.)



4. Tap the chosen role. The role turns blue, indicating that the user has now been added to the group.

To change a user's role after that user has been added, tap **Click to Choose Role**. Select the new role for that user.

Favorite

You can mark a folder where you frequently work as a "favorite". When you do this, you can navigate directly to that folder by tapping the star icon at the top navigation bar ( ).

To mark a folder as a "favorite", View Details of the folder. Tap the "favorite" icon ( ). A confirmation popup appears, confirming that the folder is now a favorite. To "un-favorite" a folder, tap the icon again.

Note You cannot mark a file as a "favorite". You can only mark folders as favorites.

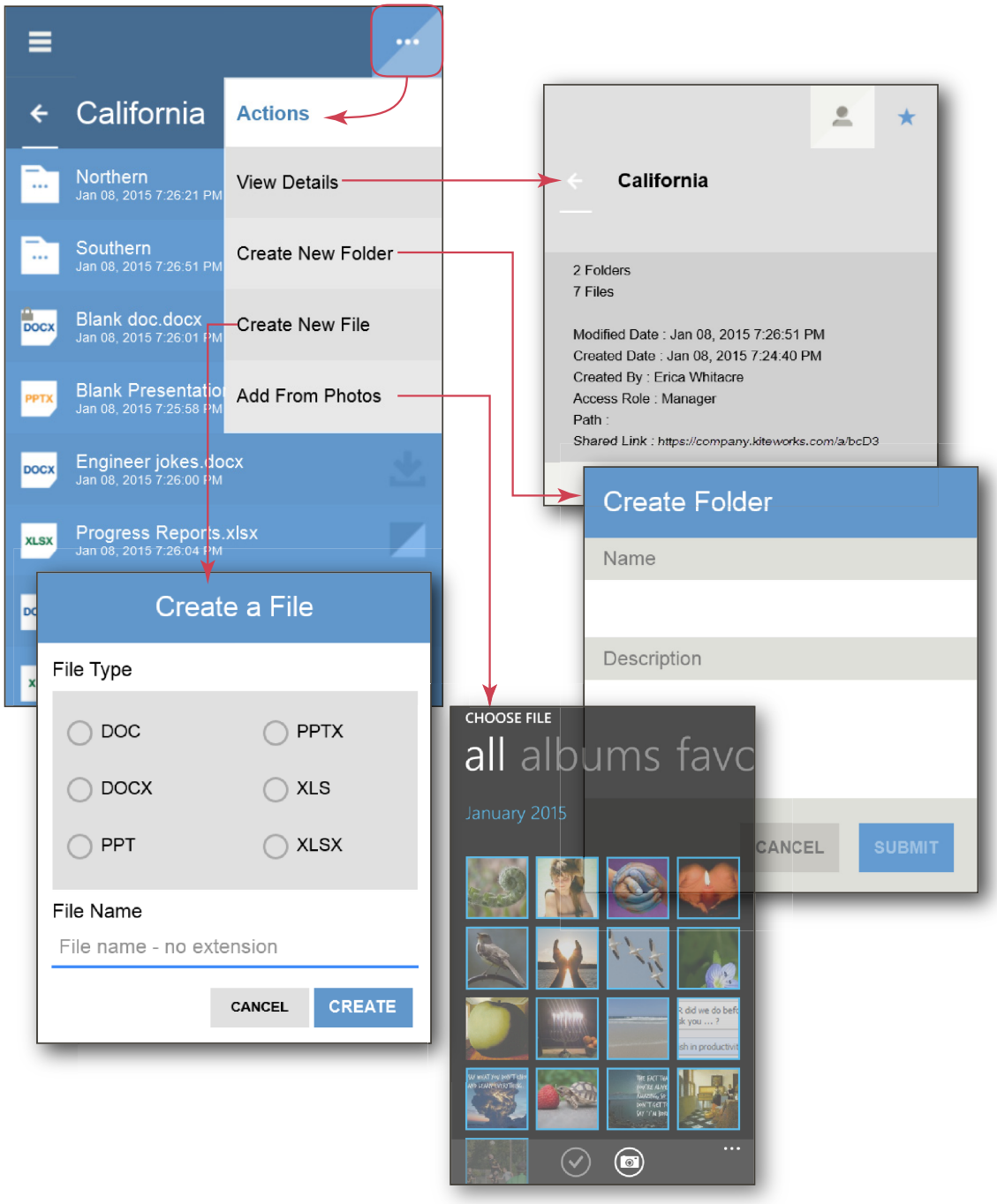
Create New

When you tap the "..." icon with a folder selected, you are shown a menu of actions. Tap each of those options and follow the prompts to perform the desired function.

Create New Folder

Create New File

Add from Photos



Roles

Roles are assigned by the manager of a specific shared folder; your role determines what functions you are able to perform on files within that shared folder.

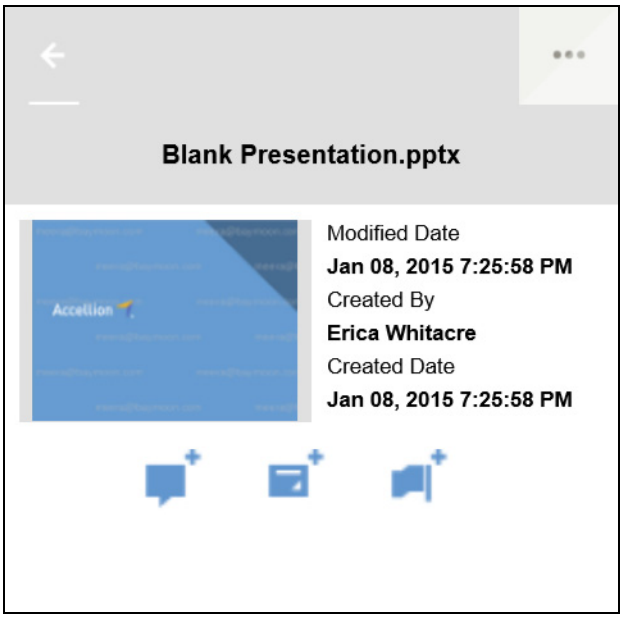
The roles that you have available to assign to collaborators on a folder are:

Viewer	Assigned to users who need to see the content that appears in a folder, but may not download the file, edit the file, or make comments on the file.
Downloader	Generally assigned to someone who needs to be able to review and add comments to the files in a folder, but not assign tasks or upload new files to that folder.
Collaborator	Generally assigned to someone who needs full access to the files in a folder, but does not need to be able to manage other users' access the folder.
Manager	Has the second-highest level of control of a folder; generally assigned to someone who needs full access to all files within a folder and can control others' access to a folder.
Owner	Has the highest level of control of a folder; generally only assigned by default to the person who created a folder.

Refer to Appendix A: User Roles for details about the specific roles and duties/responsibilities of each role.

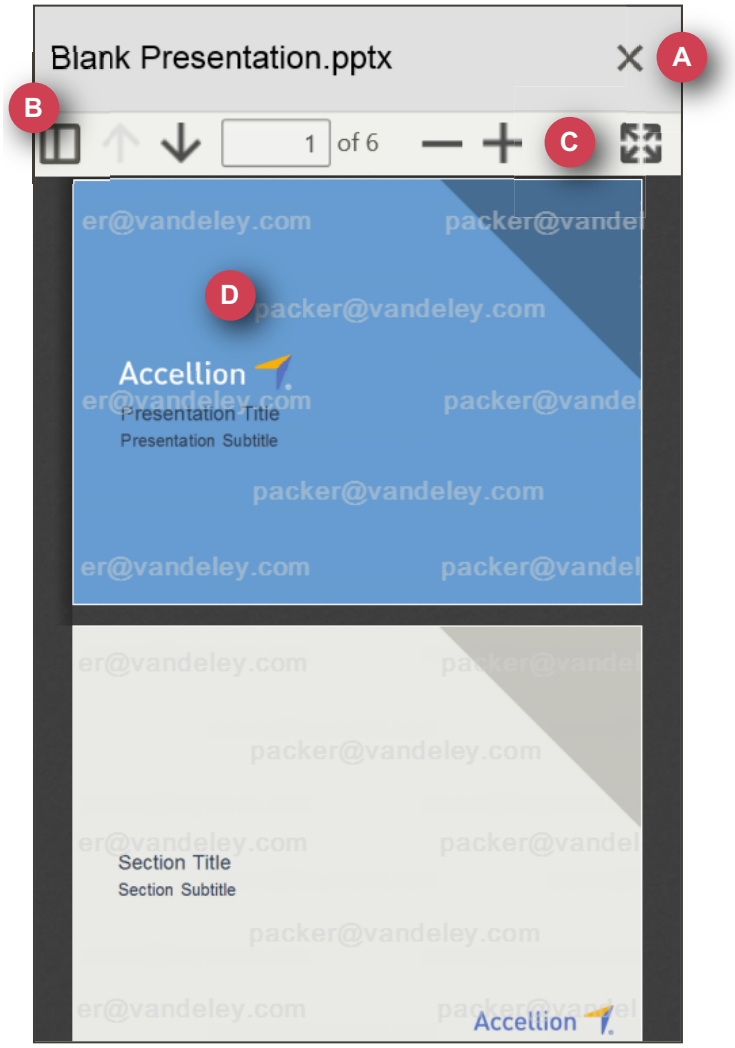
Online Viewer

If you have a Viewer role in a folder, you cannot download any file from that folder. The only way you can view that file without downloading it is to use the Online Viewer. To view the file using the Online Viewer, tap the thumbnail of the file.



Note You cannot use the Online Viewer on Enterprise Content files; this feature is only available for **kite**works files. For more information about Enterprise Content, refer to Access Enterprise Content Stores (License-Enabled).

The file opens, using the Online Viewer.



The specific sections of this screen are described in the following table.

Table 5. File Viewer

Identifier	Description	Notes
A	"X" and document title	Tap to close the file.
B	Navigation buttons	• The sidebar shows a thumbnail of each page of the file; click the toggle sidebar button to open or close the sidebar. • Tap the up and down arrows to navigate page by page. • Enter a specific page.
C	Zoom buttons	Tap the plus and minus icons to magnify the view on the screen. Tap the cross of arrows to go into presentation mode.
D	Watermark	The email address of the person viewing the file and other text determined by your kiteworks Administrator.

Manage Files

The list of available file actions depends on whether the file has been downloaded to your local device. For the full list of actions, on the file, tap the download icon ( ) to download the file to your device.

When you select a file that has been downloaded, you can perform actions on that file. Your ability to perform these functions may be limited by the role you play in that folder. For more information, refer to Appendix A: User Roles.

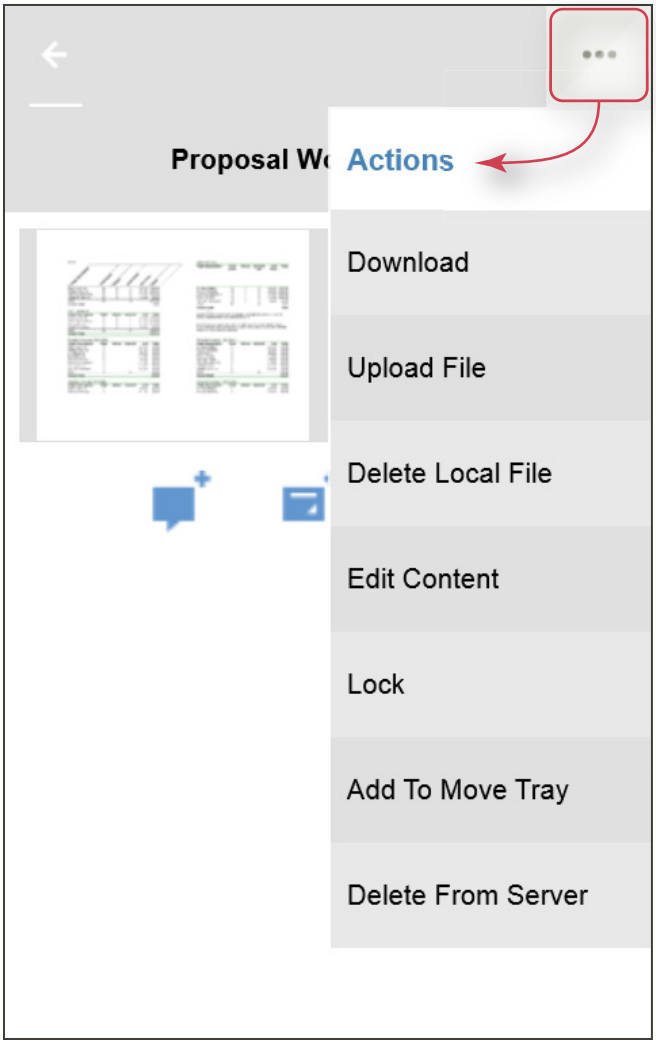

Proposal W
Actions
Download
Upload File
Delete Local File
Edit Content
Lock
Add To Move Tray
Delete From Server
Downloads all files in the folder to your device
Uploads all unsaved files in the folder to the server
Deletes the file from your device, not the server
Opens the file in the kiteworks mobile editor
Locks the file so no one else can update it
Adds the file to the Move Tray, so you can move the file to another folder
Deletes the file from the server and your device

Table 6. File Actions Menu

File Action	What It Means
Download	Downloads the file to your local device.
Upload	Uploads the file to the remote folder. This option appears after editing the file.
Delete Local File	Deletes the file from your local device. Be sure that you have uploaded your edited file to **kite**works before deleting the local file.
Edit Content	Opens the file using the integrated mobile editor, where you can edit or annotate the file. Refer to Integrated Mobile Editor. (For PDF files, instead of “Edit Content”, it lists “Annotate PDF”.)

Table 6. File Actions Menu

File Action	What It Means
Lock/Unlock	Locks or unlocks files for exclusive editing privileges. Refer to Locking Files.
Add to Move Tray	For managing where a file resides. Refer to The Move Tray.
Delete From Server	Deletes the file from the server.

Locking Files

You can lock and unlock files so others cannot edit the file while you work on it. Each file can be unlocked only by the user who locks them, or by the folder Manager. When this option is activated, others can download, comment on, and view files, but the files cannot be deleted or updated by anyone other than the user who locked the file.

1. Select the file you wish to lock.
2. Tap the "Actions" button ( ) and select **Lock**.
3. A lock icon appears on the icon of the page.

When a file is locked, a "lock" icon appears next to the document's icon.

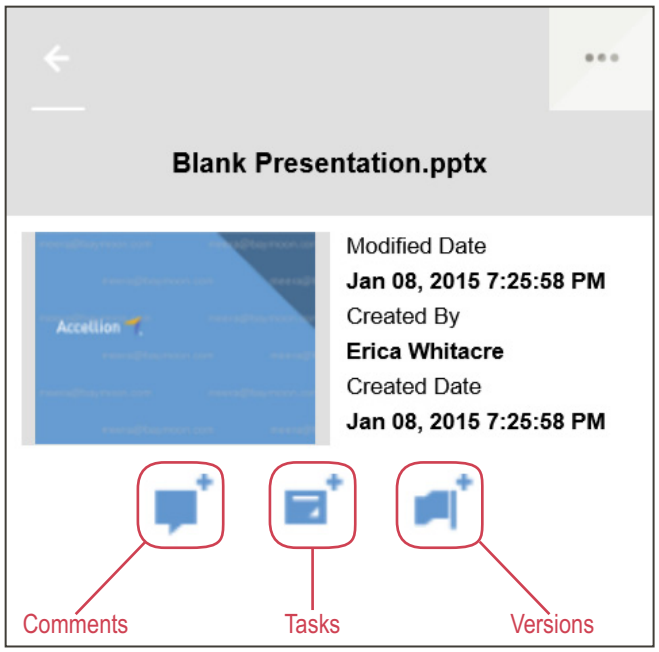
A file does not become unlocked when you upload an edited version of the file that you locked. When you upload the file, you must explicitly unlock it for others to be able to update it.

To unlock a file, perform the same action as above, but select **Unlock**.

Note Managers can unlock any file that has been locked by another user.

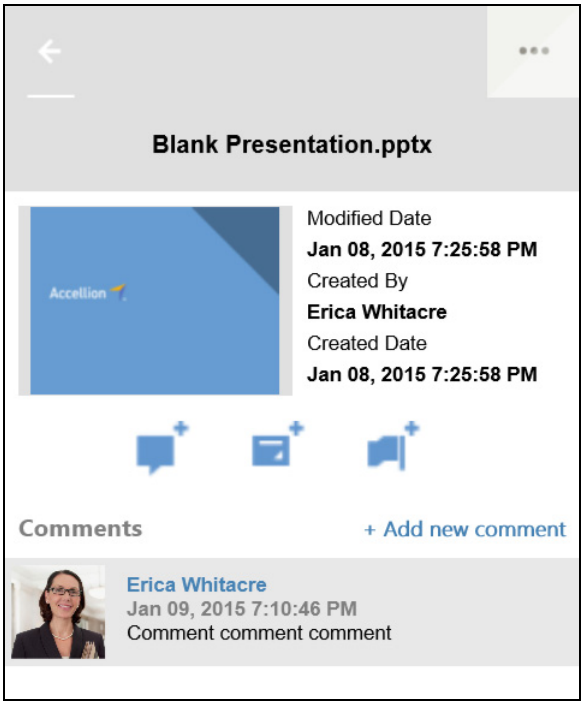
Add Comments, Tasks, and Versions

Those people who have access to a folder in **kite**works can add comments, assign tasks, or add versions of the files in the folder, depending on their user role. With the file selected, tap the icon to view or add comments, tasks or version.



Comments

To view all comments, tap the comments button. The comments that have been made on this file appear below.



To add a comment, perform the following steps.

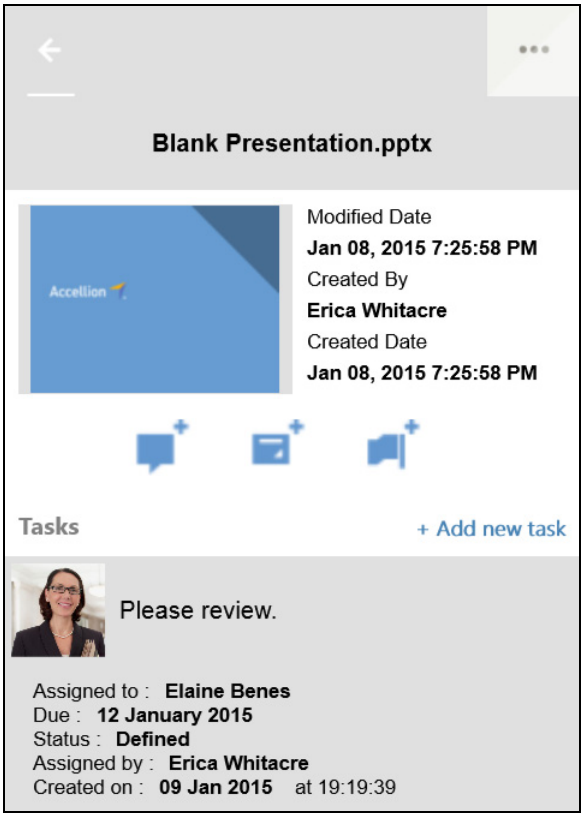
1. Select and tap a file. The file information appears.
2. At the bottom of the file information screen, tap the **Comments button**.
3. Tap **Add a comment**, and type in your comment.
4. Tap **Submit**. The comment has now been added to the file.

To reply to a comment, perform the following steps.

1. Tap on the comment to which you would like to reply. The Reply icon ( ) appears.
2. Tap the Reply icon.
3. Type in your reply and tap **Submit**. Your reply is now attached to the comment you selected.

Tasks

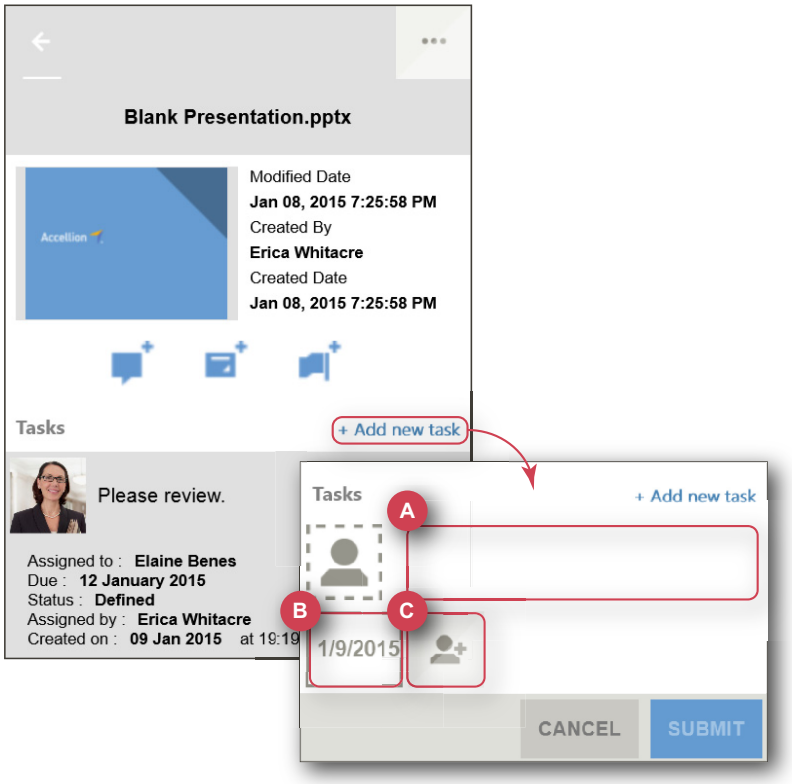
To view all tasks, tap the tasks button. The tasks that have been assigned on this file appear below.



To assign a task, perform the following steps.

1. Select and tap a file. The file information appears.
2. At the bottom of the file information screen, tap the **Task** icon.

3 Tap **Add new task**.



a. Tap the area indicated by the “A” above, and type the content of the camp.

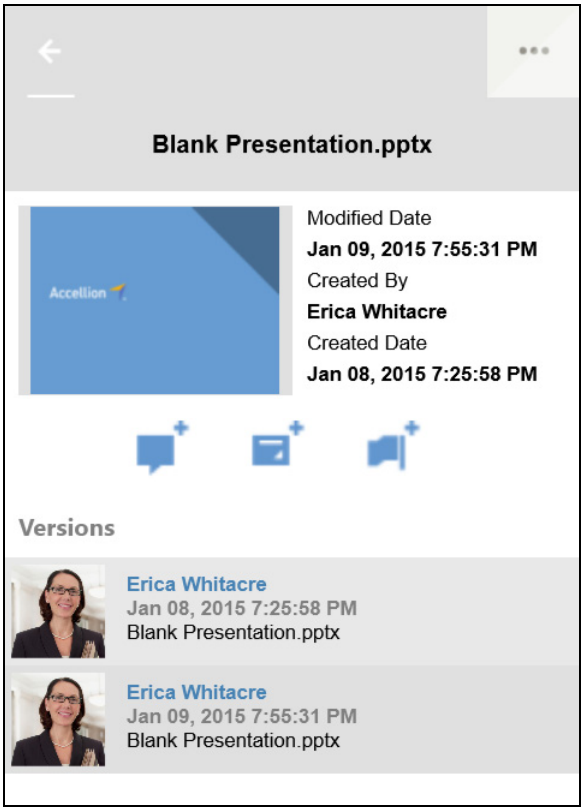
b. Tap the date (“B”), and a calendar roll appears, from which you can select the due date for the task.

c. Tap the “person” icon (“C”). A list of people who have access to the folder appear; select the person to whom the task is assigned.

4 Tap **Submit**. The person to whom you have assigned the task receives an email with the details about the task.

Versions

To view the list of previous versions of a file, tap the versions icon. A list of versions of the file appears.



To add a new version of a file, perform the following steps. This procedure assumes that you have already downloaded the file, made your changes, and are ready to upload the new version to the server.

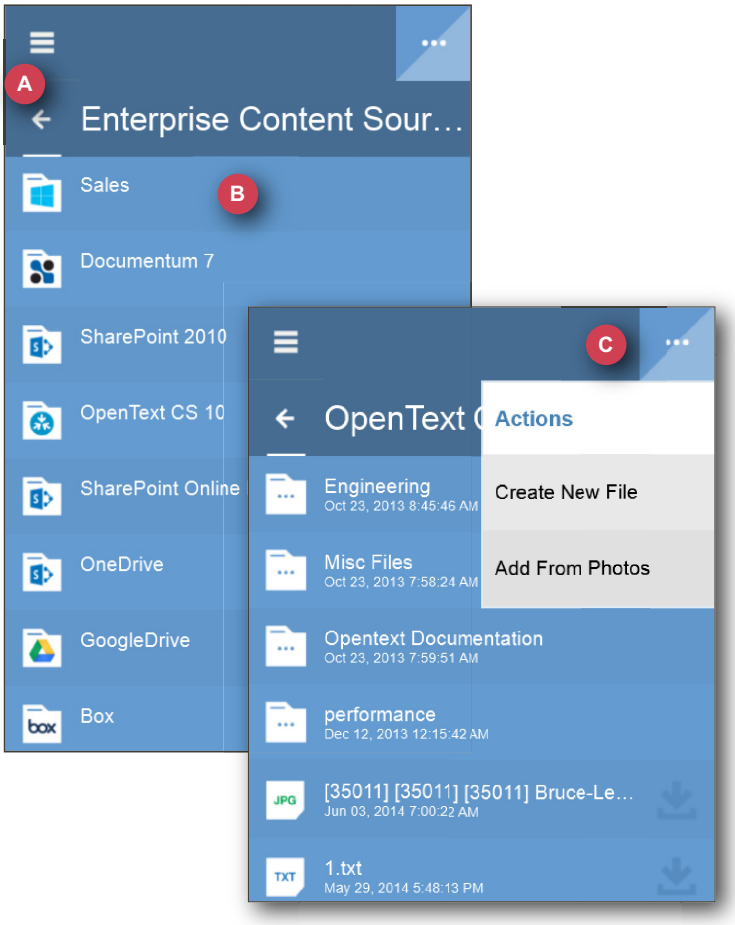
1. Select and tap a file. The file information appears.
2. Tap the “Action” button in the upper right-hand corner of the screen. A list of actions that you can perform on the file appears.
3. Tap **Upload File**. The file uploads to the server. The new version of the file is now listed with the previous versions of the file under “Version”.

Access Enterprise Content Stores (License-Enabled)

With the Enterprise Connect feature enabled, **kite**works provides access to file share data when remote interface access is enabled.

Access to enterprise content stores is managed by your Accellion Administrator and you have access to the enterprise content stores based on your Active Directory privileges. Depending on the permissions set by your Administrator, you may also be able to add your own connections to different content stores, such as SharePoint or CIFS systems.

The Enterprise Content interface looks slightly different than the regular Collaboration view.



To add new sources, log into the **kite**works server on your desktop.

Table 7. Enterprise Sources

Identifier	Description	Notes
A	File Locations Selector	Tap to choose file locations between Enterprise Content Sources and **kite**works Files.
B	Types of Enterprise Content Sources:	
box	Box Connector	Icon indicates that the content source is from Box.

Table 7. Enterprise Sources

Identifier	Description	Notes
	Documentum Content	Icon indicates that the content source is from Documentum.
	Dropbox	Icon indicates that the content source is from Dropbox.
	Google Drive Content	Icon indicates that the content source is a Google Drive.
	Home Share	Icon indicates that the content source is the home directory of your operating system.
	OpenText Content	Icon indicates that the content source is from OpenText.
	SharePoint or Microsoft OneDrive Content	Icon indicates that the content source is from Microsoft OneDrive, SharePoint 2013, SharePoint Online, or SharePoint 2007 or 2010.
	Windows File Shares Content	Icon indicates that the content source is Windows File Shares/CIFS or Distributed File Systems (DFS).
For a complete list of icons and their meanings, refer to Appendix B: Icons and Symbols.		

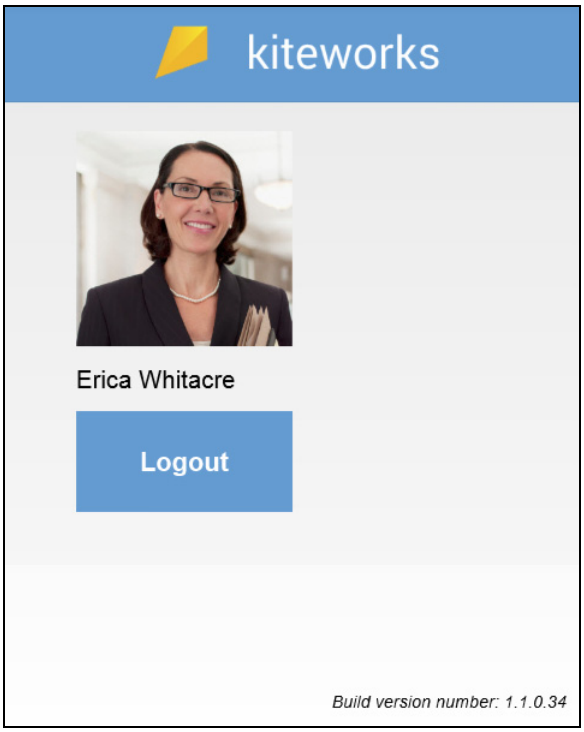
From the enterprise content folders, you can perform the following actions on files (refer to Integrated Mobile Editor):

- Download
- Lock/Unlock (available in SharePoint, Box, Documentum, OpenText, and OneDrive for Business; refer to Locking Files)
- Upload files to The Move Tray
- Add new version (refer to Versions)
- Use The Move Tray
- Edit files using the Integrated Mobile Editor

You use **kite**works to access files and folders, but you cannot make any changes to the folder hierarchy. The folder hierarchy continues to be managed outside of **kite**works. You can, however, add files and versions (where supported).

Settings

Your personal settings include your account information, password, preferences, and contacts. View these settings by tapping the Settings icon ( ) from any screen. The following screen appears.



To change any of your settings, log in to **kite**works using your desktop.

Reset PIN

To reset your pin, tap Reset PIN. This action logs you out of the mobile app, and when you log in again, you are prompted to set a new PIN.

User Photo

Your profile photo appears next to every action that you perform, both on your own account and other users' accounts. To change your user photo, log in to the **kite**works server on a desktop.

Logout

When you tap this section, a confirmation window appears, asking whether you meant to sign out of kiteworks. When you tap **OK**, you are logged out of kiteworks and have to log in again with your credentials to access your files.

Build Number

This is for internal use only.

Integrated Mobile Editor

The **kite**works integrated mobile editor combines the ease-of-use with many of the standard features in a desktop office document-editing tool. This mobile editor is compatible with and works seamlessly with Adobe PDF, Microsoft Word, Microsoft Excel, and Microsoft PowerPoint-compatible editors for your mobile device, supporting the following file types:

- Microsoft Word Files 97-2003 (*.doc) and 2007-13 (*.docx)
- Microsoft Excel Files 97-2003 (*.xls) and 2007-13 (*.xlsx)
- Microsoft PowerPoint Files 97-2003 (*.ppt) and 2007-13 (*.pptx)
- Portable Document Format (*.pdf) (View and Annotate only; you cannot create a PDF using the mobile editor)

To edit documents using the **kite**works mobile editor:

1. Download the file to your local device (refer to Integrated Mobile Editor).
2. Select the file.
3. Tap the "…" icon. The action menu appears.
4. Select **Edit Content**. The file now opens using the integrated mobile editor, without leaving your secure area.

To create a new document using the **kite**works mobile editor:

1. With the folder selected, tap the "…" icon.
2. From the menu that appears, select **Create a File**. The Create a File dialog box appears.
3. Using the radio buttons, select the type of the file you wish to create.
4. Enter a file name.
5. Tap **OK**. The file now opens using the **kite**works mobile editor, without leaving your secure area.

Microsoft Word Files

You can work with the document on screen by tapping it with your finger. The commonly-used gestures are:

Table 8. Commonly Used Gestures

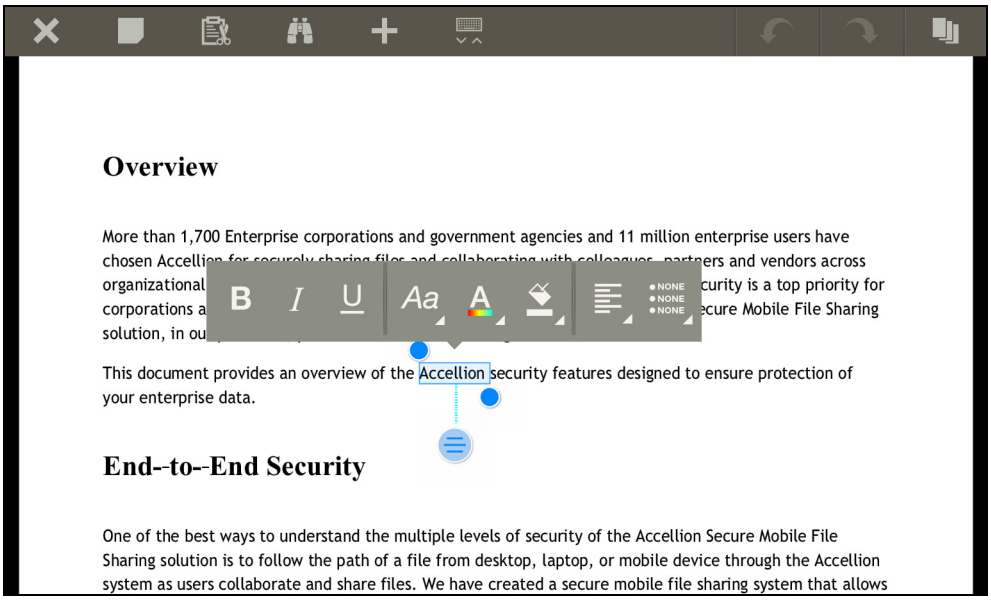
Gesture	Usual Function
Drag (press hold)	Pan (scroll) around page, or adjust caret position.
Pinch (two fingers)	Zoom in or out.
Single tap	Place insertion caret, or close action bar or menu.
Double tap	Select word.

You can zoom in or out with a two-finger “pinch” gesture, to make the content as big or as small as you like. With large text, you may like “reflow”, which reformats the text to fit your screen width. You can zoom out to make a page of the document smaller than your screen; using this, you can fit several pages, and still edit and work on it.

You can pan (scroll) through the pages of the document by dragging your finger up the screen, or using the page carousel in the top menu bar.

Understanding the Screen

At the top of the screen is the top bar containing “global” options. In the main part of the screen is your document, in which you may select fragments or enter new content. Options are grayed out if they are not available in your current state.

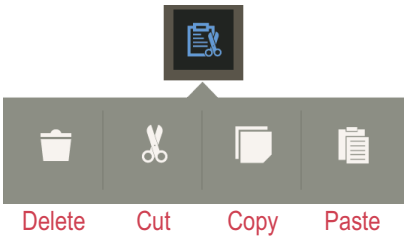

Overview
More than 1,700 Enterprise corporations and government agencies and 11 million enterprise users have
chosen Accellion for securely sharing files and collaborating with colleagues, partners and vendors across
organizational
curity is a top priority for
corporations a
ecure Mobile File Sharing
solution, in ou
This document provides an overview of the Accellion security features designed to ensure protection of
your enterprise data.
End-to-End Security
One of the best ways to understand the multiple levels of security of the Accellion Secure Mobile File
Sharing solution is to follow the path of a file from desktop, laptop, or mobile device through the Accellion
system as users collaborate and share files. We have created a secure mobile file sharing system that allows

When you select text on a tablet-sized device, an action menu with editing options appears near the highlighted area. On a phone, the action bar appears at the bottom of the screen. Equivalent features are available on both types of device.

Top Menu Icons

The top of the screen shows icons for actions global to the whole document and application, not just to the part you are currently working with.

Table 9. Mobile Editor Top Menu Icons

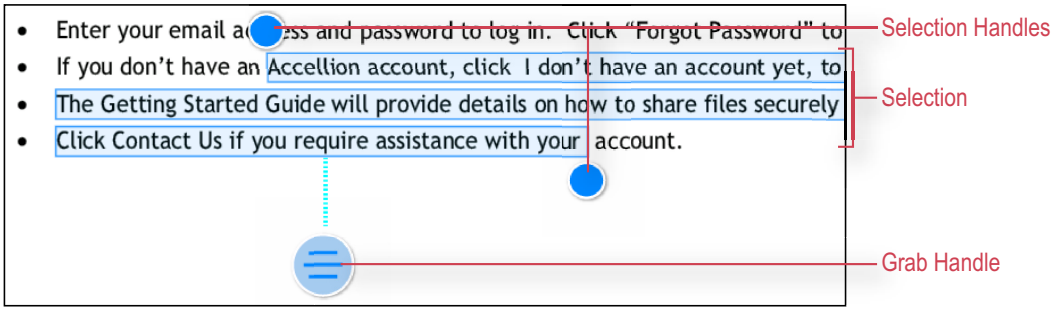
Icon	Button	Description
	Close	Closes the file and takes you back to the kiteworks interface. If you have made changes in your document, you will be prompted to save your document.
	File	Brings up a menu to perform the following functions: • Save • Help - Brings up the Accellion FAQs
	Cut/Paste	Brings up a menu to perform the following functions: 
	View	Brings up a menu to perform the following functions: • **Reflow** - Normally, pages are laid out as they would be printed. When you reflow the file, font sizes are scaled to be readable, images are scaled to be no bigger than the screen, and objects such as tables are laid out vertically rather than horizontally. • **Find** - Brings up a search dialog box.
	Add	Brings up a menu to add the following elements: • **Shapes** - Lines, shapes, and callouts (not currently supported) • **Image** - Images currently saved in your device • **Photo** - Opens your camera to take a photo and place that photo directly into the document
	Keyboard	Brings up the keyboard so you can type in the document. Tap the button again to hide the keyboard.
	Undo/Redo	After making a change to your document, you can undo (and later re-do) the action.
	Pages	Shows thumbnails of each page in your document in a carousel format. Pan left or right to select any page to view normally, or return to the previous one by tapping the Pages icon again.
For a complete list of icons and their meanings, refer to Appendix B: Icons and Symbols.		

Editing Text

Place a red insertion caret by tapping anywhere in the document, allowing you to type new text. (If the caret does not appear quite where you expected it, touch and hold your finger on the insertion point. The screen zooms to help you drag it to the position you wish.)

Double-tap the area that you want to edit. The word you tap becomes highlighted and a formatting action bar appears above the selection (on a tablet) or at the bottom of the screen (on a phone).

To select a string of words, drag the round icons to highlight a selection. To move the highlighted text to another location, drag the "hand" icon attached to the highlighted section to its new location.

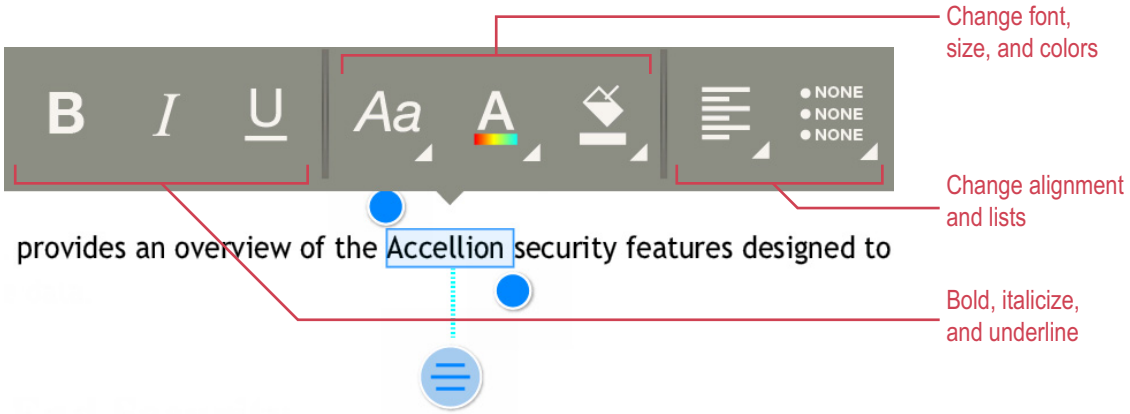


At the top of the screen, tap the keyboard icon ( ) to bring up the keyboard. Type your edits.

To delete text, with the text highlighted, tap the cut/paste button ( ) and select delete ( ).

Formatting Text

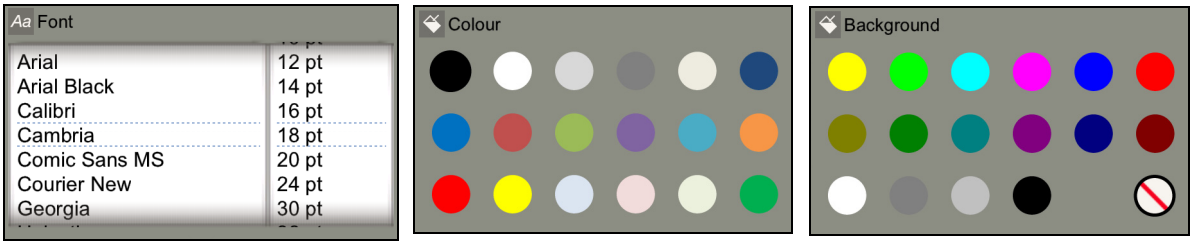
When you highlight a selection, a formatting action bar appears above the highlighted area (in a tablet), or a formatting action bar appears at the bottom of the screen (in a phone).


Change font, size, and colors
Change alignment and lists
Bold, italicize, and underline
provides an overview of the Accellion security features designed to

Using this menu or action bar, you can perform the following functions:

- Bold, italicize, and underline

- Change font and size, color of the text, and background color (additional popup menus appear)

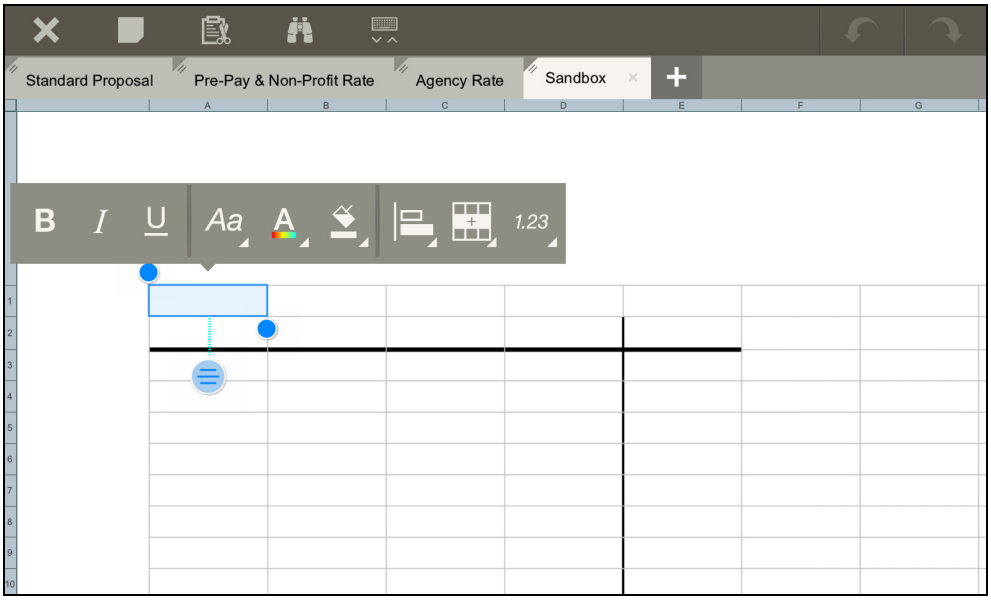


- Change alignment, make the selected area into a bulleted or numbered list, and change indentation (additional popup menus appear)

Microsoft Excel Files

Spreadsheet files are also shown with a “tab” for each sheet in the workbook. You can switch between these by tapping the named tab.

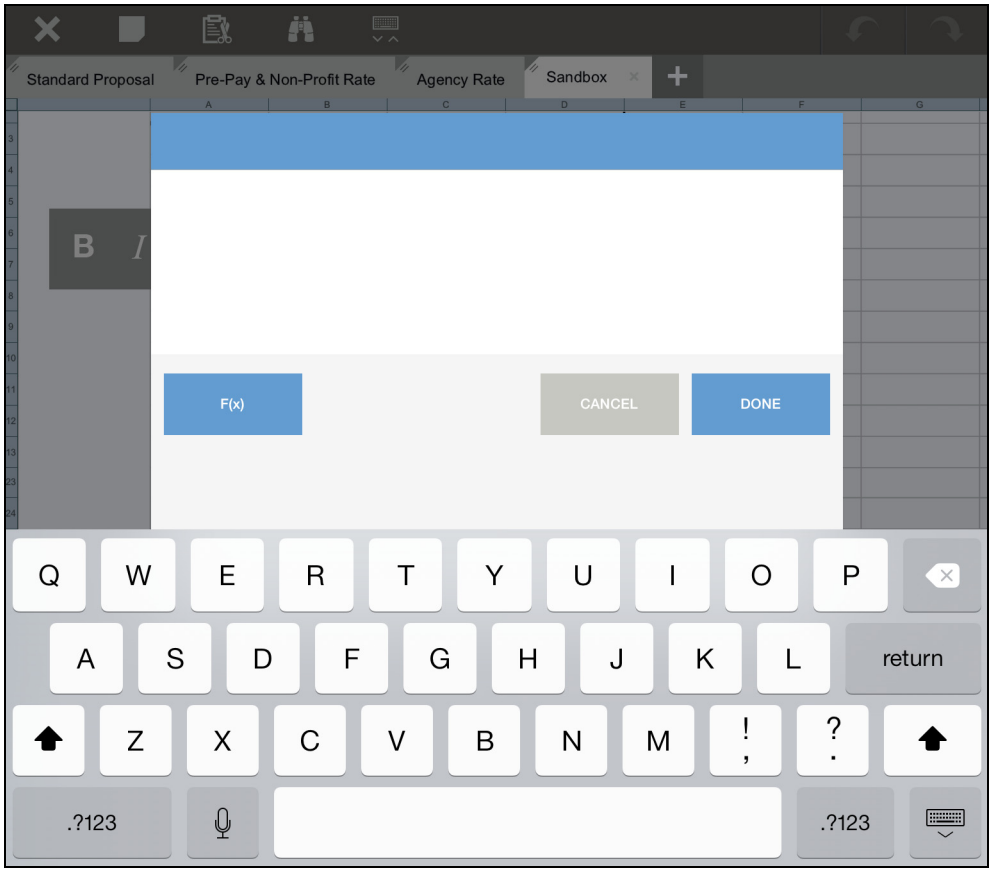
You can also re-order them by holding then dragging a tab, delete a sheet entirely by tapping the “x” icon in the tab, or add a new one by tapping the “+” tab on the right.



Editing Cells

To edit a cell, perform the following steps.

1 Double-tap on a cell. An editing popup screen appears.

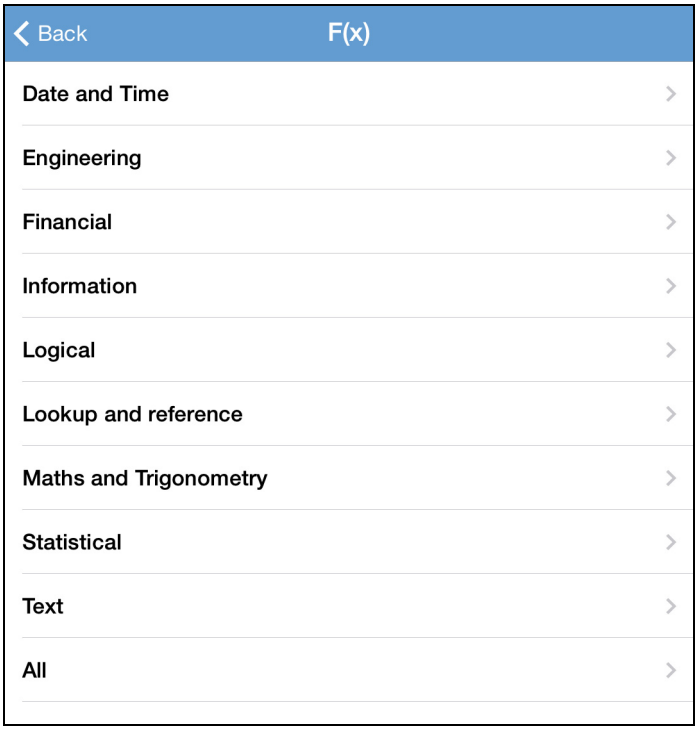


2 Type in the content of the cell.

Note Using the “keyboard” in spreadsheets on your device doesn’t work specifically as a keyboard on a computer does. For example, the “enter” key does not advance you to the next cell; it creates a new line in the cell. Also, there is no “key” to close the window when editing is done; to close the window, you must tap **Done**.

3 To use a pre-calculated formula in a cell, perform the following steps:

a. Tap the **F(x)** button. The function menu appears.



b. Tap the type of formula you would like to use. More than 100 available functions are available.

c. Select the formula.

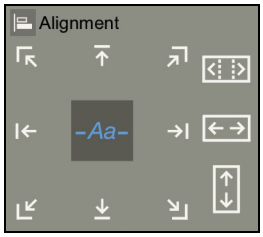
4 Tap **Done**. If you edit a cell value, the spreadsheet is recalculated, including dependencies.

Formatting Cells

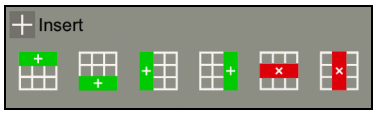
When you highlight a cell or a group of cells, a formatting action bar appears above the highlighted area (in an iPad), or a formatting action bar appears at the bottom of the screen (in an iPhone).

Using this menu or action bar, you can perform the following functions:

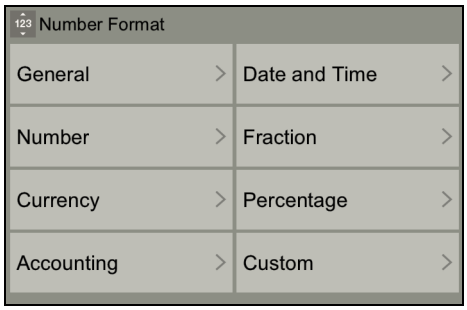
- Bold, italicize, and underline
- Change font and size, color of the text, and background color
- Change alignment of the cell



- Insert rows or columns

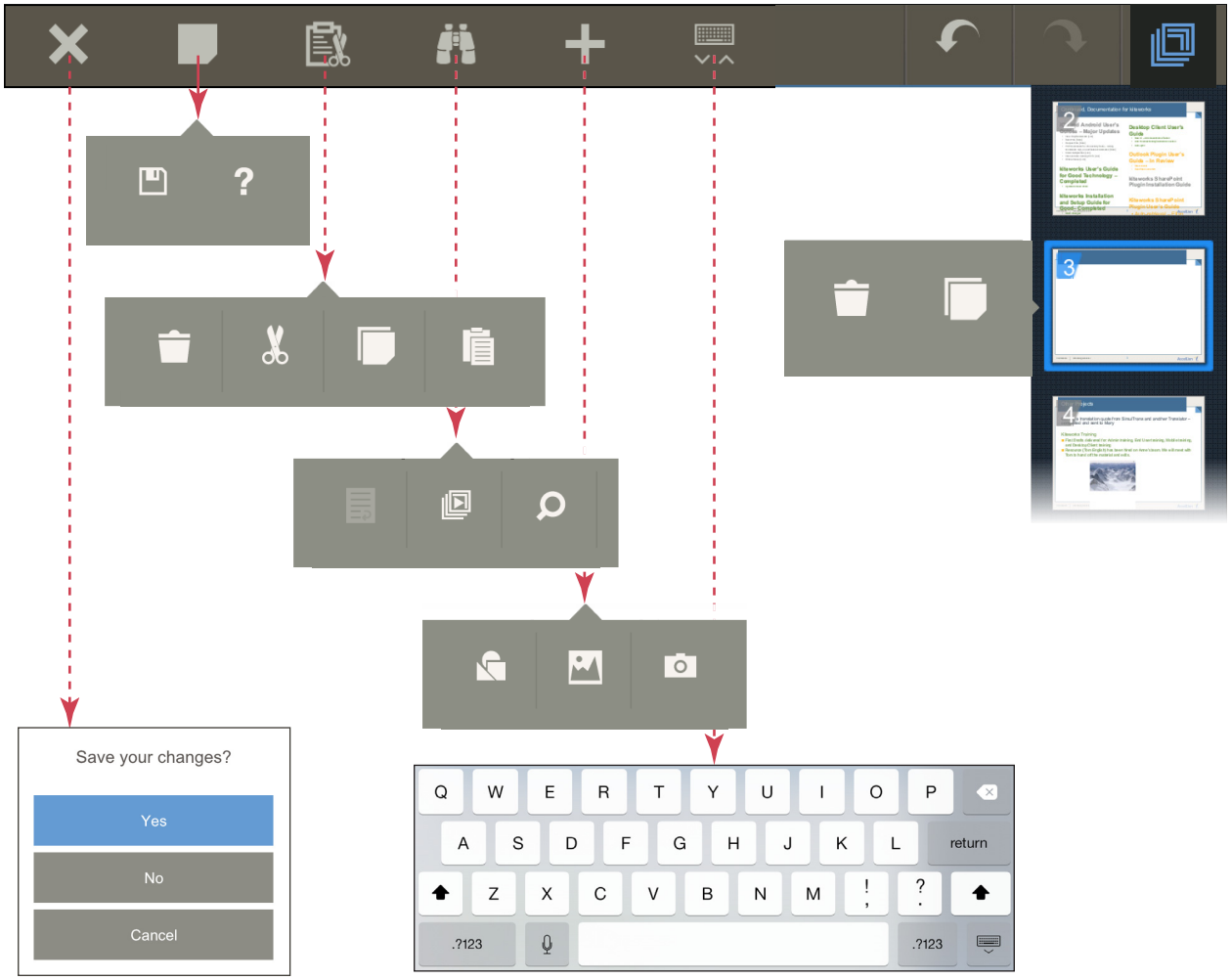


- Change the number format of the cell



Microsoft PowerPoint Files

The process to edit PowerPoint slides is very similar to editing a Word document.



Navigation

The menus in the PowerPoint interface are very similar to the Word document. The differences in icons are listed below.

Table 10. Mobile Editor Icons for PowerPoint

Icon	Button	Description
	Slides (on top navigation bar)	Opens the Slide Sorter, which is a panel that shows thumbnails of each slide. In the slide sorter, tap on a slide thumbnail to jump to viewing that particular slide. Tap and hold to select it; you can then drag it up or down through the sequence to re-order it.
	Presentation Mode (from the "view" menu	Switches the view to full-screen mode for presentations.

Table 10. Mobile Editor Icons for PowerPoint

Icon	Button	Description
	Delete Slide	Tap and hold a slide to bring up a dialog box. In this box you can select **Delete Slide** or **Copy Slide**, which adds the copied slide to the end of the slide deck.
	Copy Slide	

For a complete list of icons and their meanings, refer to Appendix B: Icons and Symbols.

The text in PowerPoint slides can be edited, if the slide uses the master style. If it is not possible to edit a slide, this is usually because of the way it was originally created.

Formatting Text

When you highlight a selection, a formatting action bar appears above the highlighted area (in a tablet), or a formatting action bar appears at the bottom of the screen (in a phone).

Using this menu or action bar, you can perform the following functions:

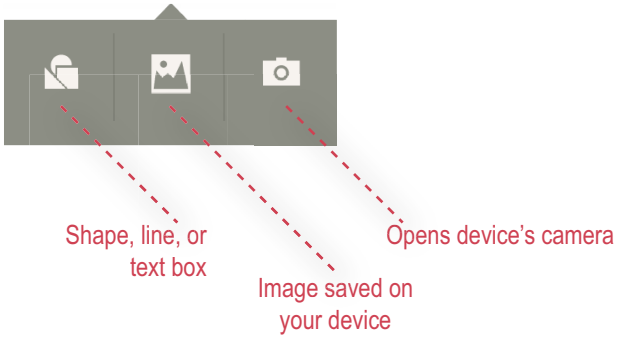
- Bold, italicize, and underline
- Change font and size, color of the text
- Change alignment of the line of text

Objects

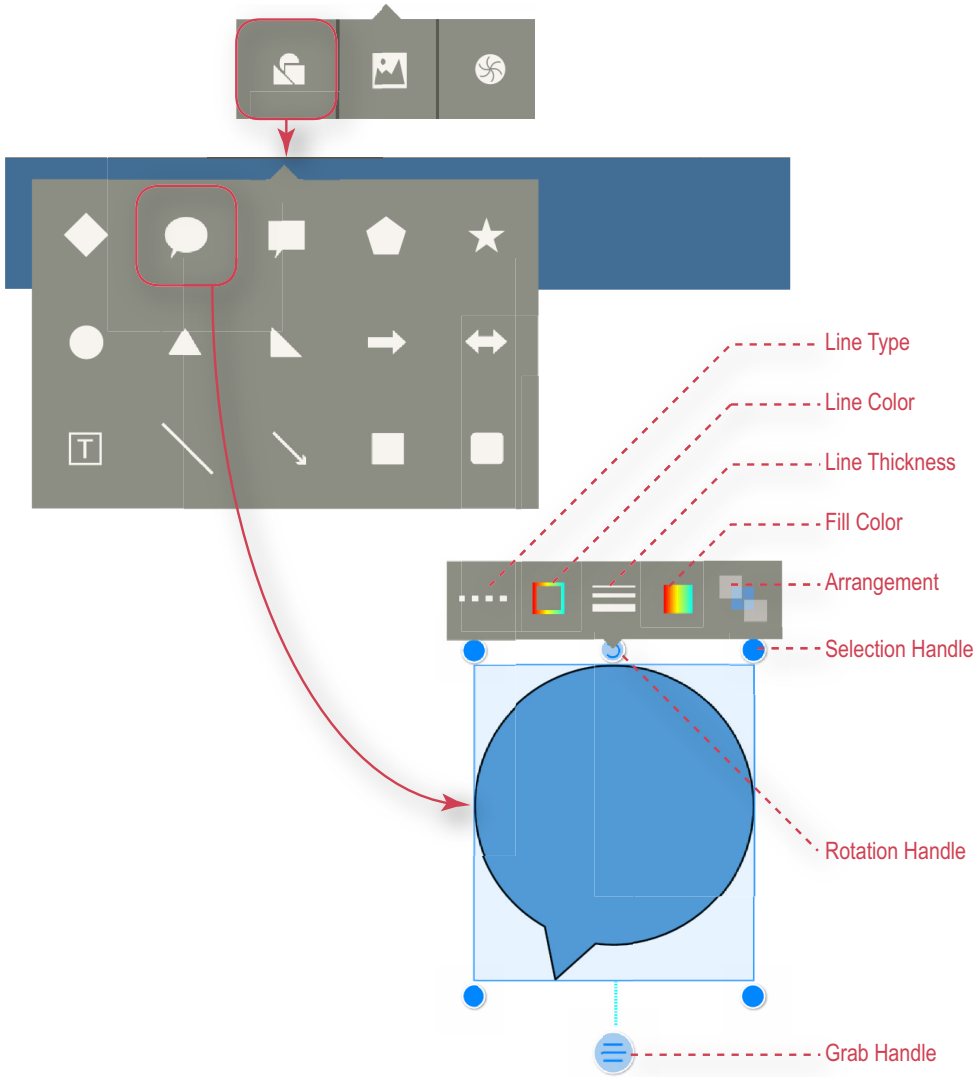
Objects — shapes, images, and photos — can be inserted and edited into a slide.

Insert Object

To add a new shape to a PowerPoint presentation, tap the **Add** button from the top menu. The Add menu appears. You can add objects, photos saved on your device, or open the camera to take a photo.



Select the object to insert into the presentation. It then appears in the presentation with handles surrounding it.



Edit Object

While a shape is selected, the action bar (or callout menu) shows options for adjusting the line type (solid, dotted, or other), line color and opacity, line thickness, fill color and opacity, and arrangement of objects on a slide.

Table 11. Mobile Editor Icons for PowerPoint

Icon	Button	Description
	Line Type	Select solid, dotted, and other types of line styles.
	Line Color	Change the color and opacity of the line.

Table 11. Mobile Editor Icons for PowerPoint

Icon	Button	Description
	Line Thickness	Adjust the thickness and opacity of the line.
	Shape Fill	Allows you to fill the shape with a color, and adjust the opacity of the fill.
	Arrangement	Allows you to set the layers of objects.

For a complete list of icons and their meanings, refer to Appendix B: Icons and Symbols.

Portable Document Format

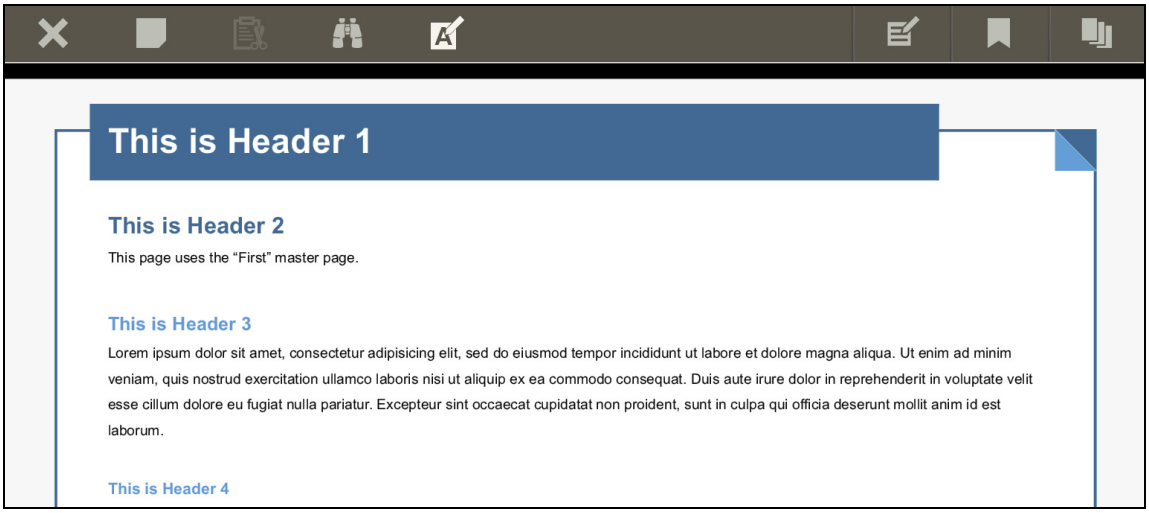
Key features of the **kite**works PDF annotation feature includes the ability to:

- Annotate PDF files with highlights, notes, shapes.
- Search the PDF file for words or phrases.
- Show, add, and delete bookmarks in the PDF file.

To annotate a PDF file, perform the following steps.

1. Download the PDF file to your mobile device.
2. Tap the " " icon to the right of the PDF file. An action menu appears.
3. Tap **Annotate PDF**. The PDF Annotator interface appears.

PDF Annotator Interface


This is Header 1
This is Header 2
This page uses the "First" master page.
This is Header 3
Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
This is Header 4

The icons used in the PDF Annotator tool are as follows:

Table 12. PDF Annotator Tool Top Menu Icons

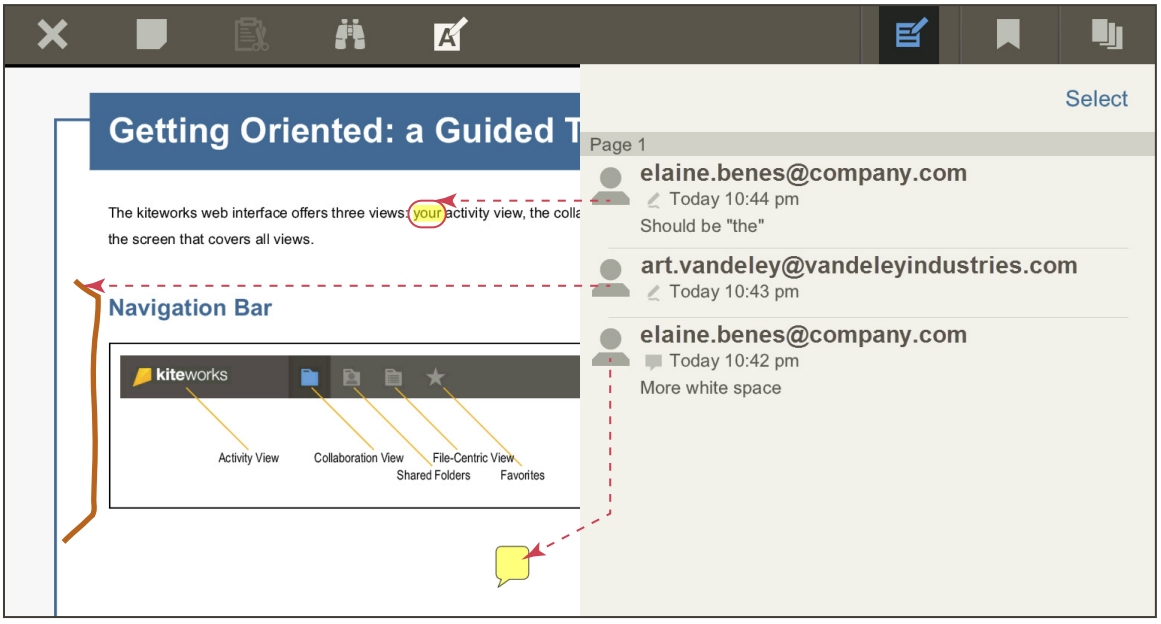
Icon	Button	Description
	Close	Closes the file. If you have made changes in your document, you will be prompted to save your file.
	File	Brings up a menu to perform the following functions: • Save • Save As • Help - Brings up the Accellion FAQs
	Cut/Paste	To be used only for deleting an annotation; this does not work for editing text on the PDF file.
	View	Brings up a menu to perform the following functions: • Reflow - Normally, pages are laid out as they would be printed. When you reflow the file, font sizes are scaled to be readable, images are scaled to be no bigger than the screen, and objects such as tables are laid out vertically rather than horizontally. • Find - Brings up a search dialog box. • 3D - Changes the document to use a red-blue Anaglyph 3D effect.
	Annotate	Brings up a menu to add the following elements: • Annotation - Add highlighting, notes, freehand lines, and comments to the file • Shapes - Lines, shapes, and callouts (not currently supported) • Image - Images currently saved in your device (not currently supported) • Photo - Opens your camera to take a photo and place that photo directly into the document (not currently supported)
	Annotation List	Brings up a list of annotations that have been made to file.
	Bookmarks	Shows the bookmarks that currently exist in the file.
	Add Bookmark	Allows you to add Bookmarks to the file.
	Pages	Shows thumbnails of each page in your document. You can pan left or right to select any page to view normally, or return to the previous one by tapping the Pages icon again.
	Bookmarks: Delete	Allows you to delete bookmarks from the file.
	Highlight	Highlights the selected text.
	Freehand line	Allows you to draw a freehand line.

Table 12. PDF Annotator Tool Top Menu Icons

Icon	Button	Description
	Note/Comments	Allows you to insert a comment on the file.
	Color of annotation	Allows you to select the color of annotation line.
	Line Width	Allows you to determine the width of the annotation line.
	Accept annotation	When placing a freestyle line, you must tap this icon to affix the line to the PDF file.
	Reject annotation	To reject the freestyle line you may have placed, tap this icon to delete it.
For a complete list of icons and their meanings, refer to Appendix B: Icons and Symbols.		

Annotation List

To view a list of the annotations that have already been made on the file, tap the Annotations button ( ). A panel with the list of annotations appears, including the type and content of the annotation, who made the annotation, and when the annotation was made. You can also see up to two lines of text if there is text associated with the annotation.



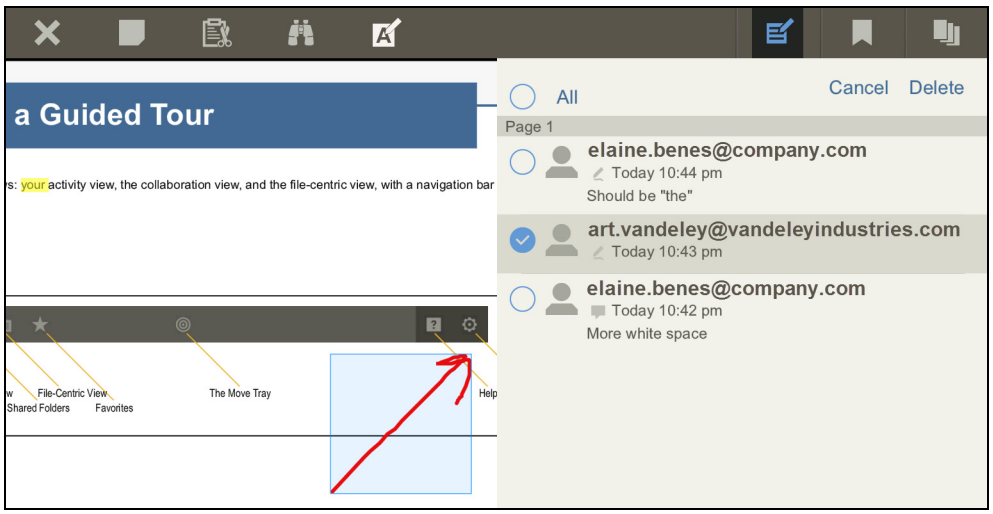
Tap the annotation to navigate to the location of the annotation.

To delete an annotation:

1. Tap the Annotation button ( ). The annotation list appears.
2. Tap **Select**. A selection bullet appears next to each item.

3 Tap the radio button to select the annotation(s) to delete. You can also select **All**.

4 With the annotation(s) selected, tap **Delete** or sweep to the left.



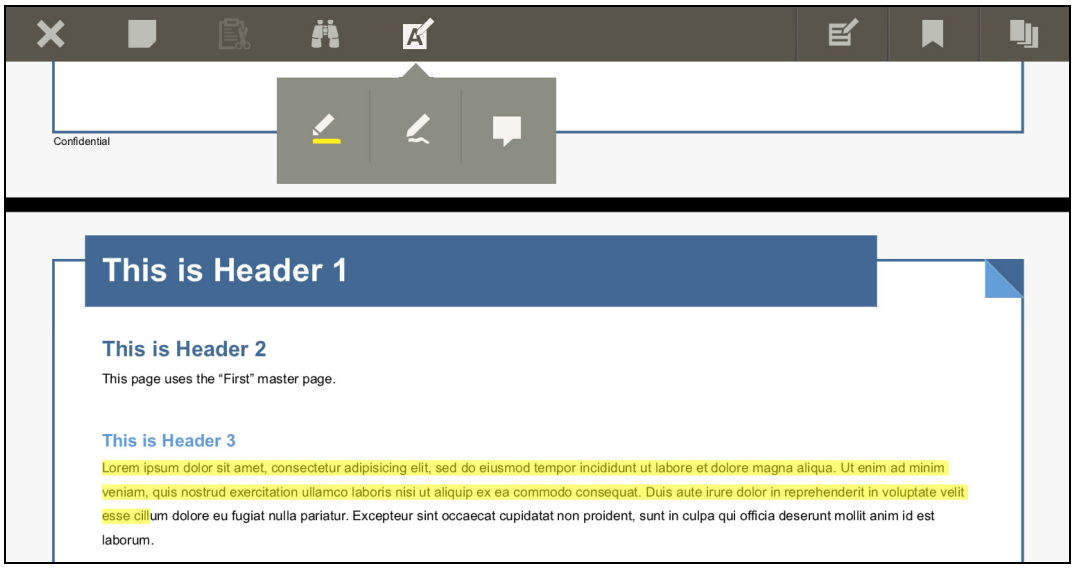
The annotation is deleted.

Adding Annotations

To add an annotation to a PDF file, perform the following steps.

1 Open the PDF file using **kite**works mobile editor.

2 On the top of the screen, tap the Add icon. The Add menu appears, with the three types of annotations: highlighting, freestyle line, or comment. (The highlighting tool, the one on the left, is disabled unless text is already selected.)


Confidential
This is Header 1
This is Header 2
This page uses the "First" master page.
This is Header 3
Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Highlighting

To highlight text, first select the text to highlight, then select the highlight button. The highlight is in yellow.

To add a comment to your line, double-tap the annotation, and comment field appears. Type in your annotation and when complete, tap away from the field.

Freestyle Line

The Freestyle Line allows you to draw a line or shape of your own design. You can choose the color and thickness of the line, and you can also add a comment to the annotation.

1. When you select the Freestyle line icon, a new menu appears in the upper left corner of the screen.

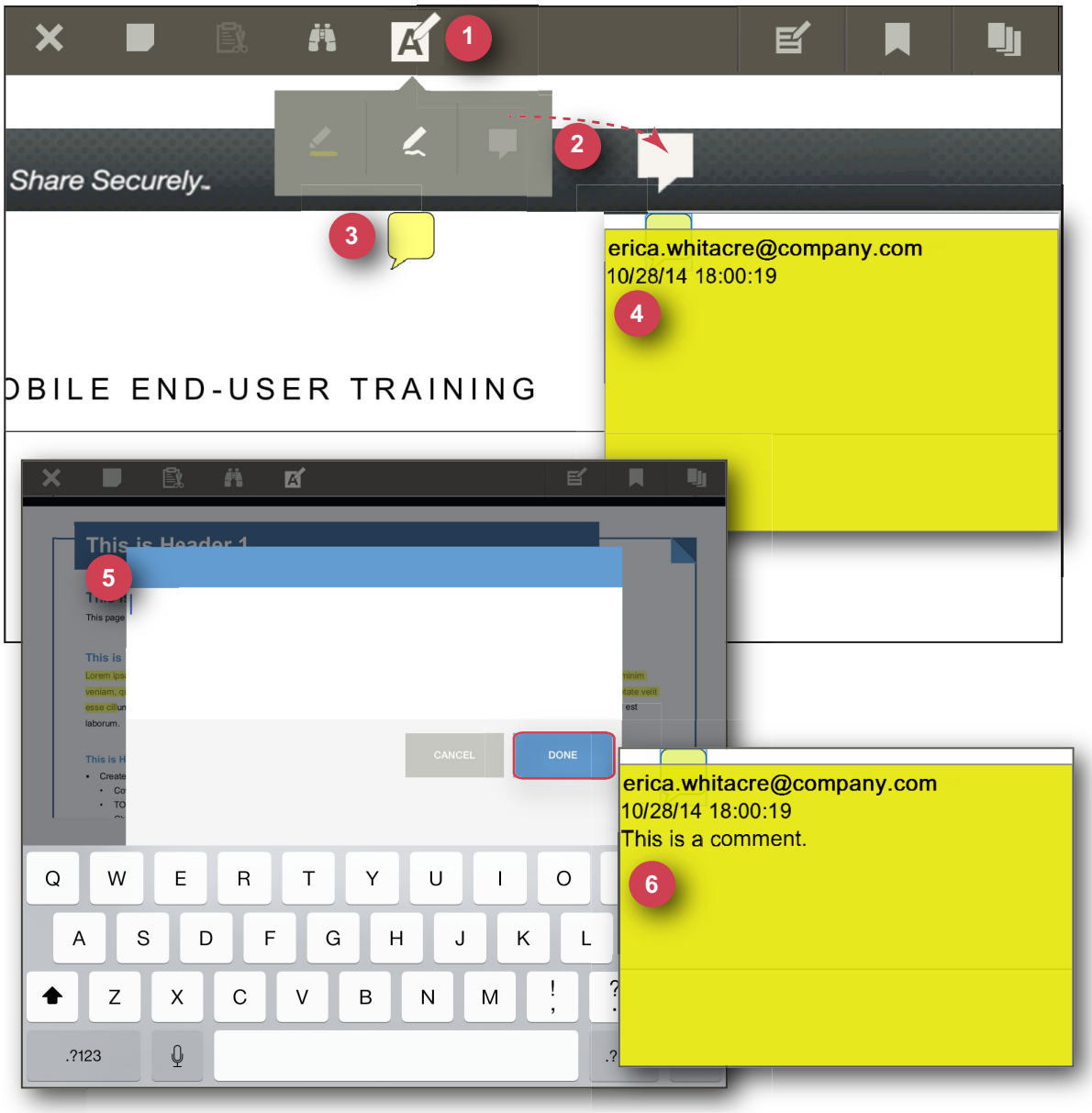
   This menu allows you to change the color of the line, the thickness of the line, and to accept or delete your annotation.
2. Draw your line, and make the color and line thickness adjustments by scrolling through the menus.
3. When you are satisfied with your line, tap the checkmark. The line is now affixed to the file.
4. To discard your line, tap the “x”.
5. To add a comment to your line, double-tap the annotation. A comment field appears.
6. Type in your annotation and when complete, tap away from the field.

Comment

A comment appears as a callout icon on your PDF file.

1. Tap the “Add” button.
2. Drag the Comment icon onto the page. A comment “ghost” appears where you drag.
3. When you let go of the ghosted icon, it turns yellow.
4. Tap in the comment icon. An empty comment box appears.
5. Double-tap in the comment box. The comment window appears. Type your comment. When finished, tap **Done**.

6 Tap away from the text box. The comment is now affixed to the file, and identifies you as the one who wrote it and the time that it was written.

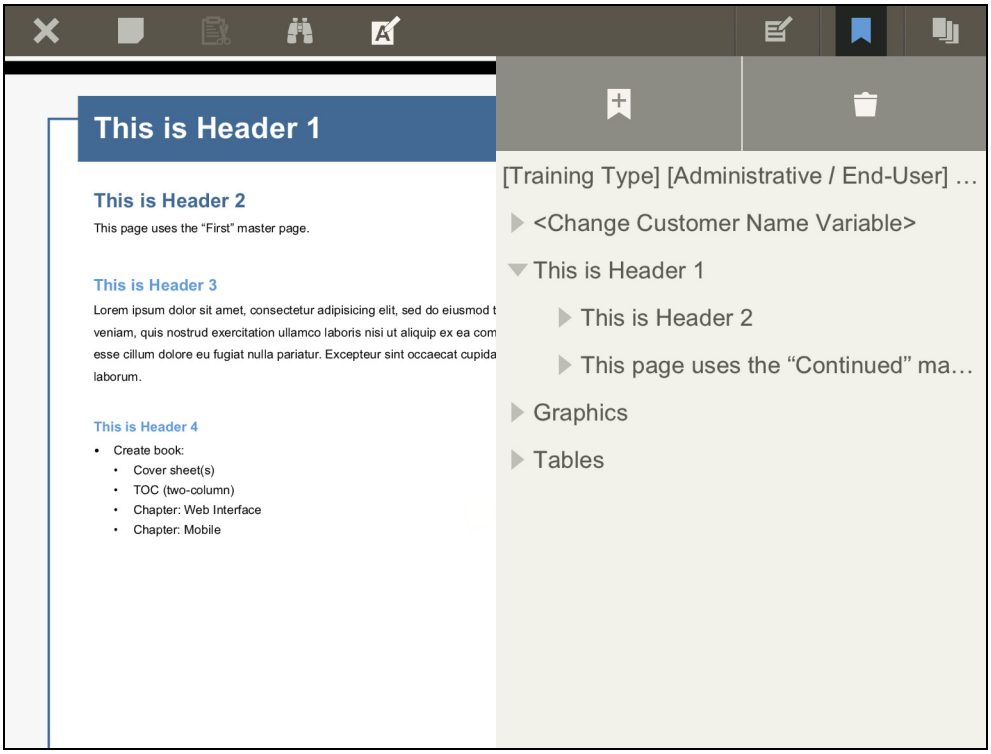


To view the comment, tap the comment icon on the page. To close the comment pop-up, tap away from the comment.

To delete any annotation, select the annotation, tap the Cut/Paste icon at the top menu ( ), and tap the Delete icon ( ).

Bookmarks

To view the bookmarks that currently exist in the file, tap the bookmark icon in the Navigation Bar. The following panel appears.

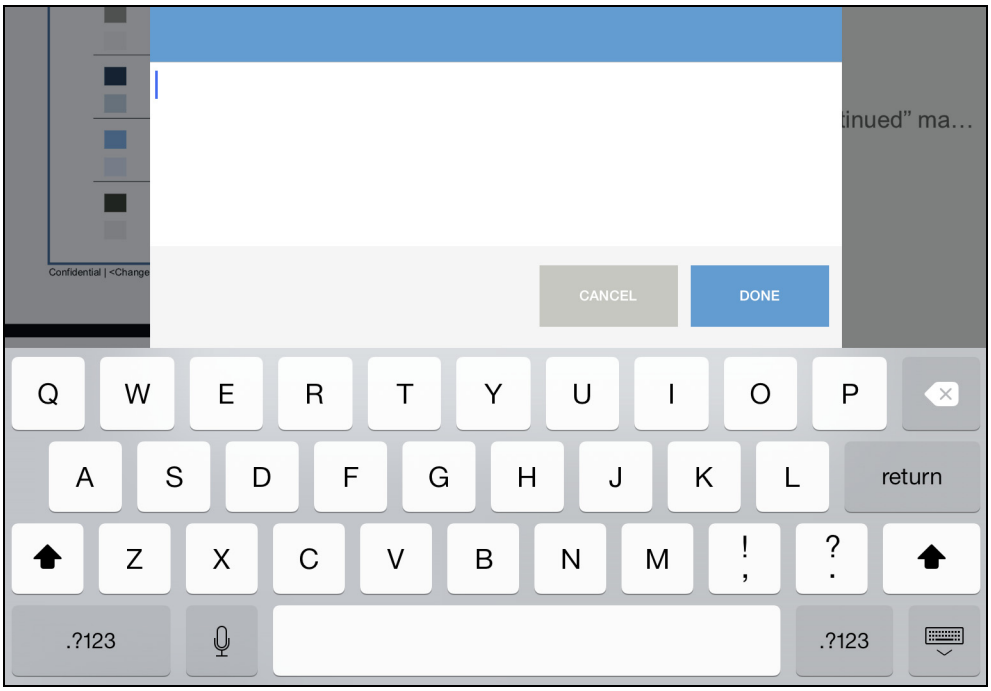

This is Header 1
This is Header 2
This page uses the "First" master page.
This is Header 3
Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod t
veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea com
esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupida
laborum.
This is Header 4
Create book:
Cover sheet(s)
TOC (two-column)
Chapter: Web Interface
Chapter: Mobile
[Training Type] [Administrative / End-User] …
<Change Customer Name Variable>
This is Header 1
This is Header 2
This page uses the "Continued" ma…
Graphics
Tables

To view nested bookmarks, tap the triangles to collapse or expand the headers.

To add new bookmarks to your file, perform the following steps.

1 Navigate to the destination to which you would like the new bookmark to appear.

2 Tap the **Add Bookmark** button ( ). You are prompted to enter a name for the new bookmark.



3 Tap **Done**. The new bookmark appears in the list of bookmarks.

Resources

For further information, refer to the *kiteworks User's Guide*.

If you have questions that were not answered by this guide, visit our knowledge base at:

https://support.accellion.net/

For support on technical issues, visit our support portal at:

http://www.accellion.com/support

Appendix A: User Roles

Table 1. User Roles and Access Privileges

Permission Control	Viewer	Downloader	Collaborator	Manager	Owner	Notes
View files	Yes	Yes	Yes	Yes	Yes	View files without downloading the file to a mobile device.
View Activity Report	Yes	Yes	Yes	Yes	Yes	View activity for a file or folder. All file activities appear in the report for the parent folder as well.
Download	—	Yes	Yes	Yes	Yes	Download a file to the desktop or to a mobile device.
Add Comment	—	Yes	Yes	Yes	Yes	Add comments to a file or folder.
Subscribe for notifications	—	Yes	Yes	Yes	Yes	Request to receive an email notification any time an action is performed on a folder.
View Users	—	Yes	Yes	Yes	Yes	View others who have access to the folder.
Be assigned a task	—	Yes	Yes	Yes	Yes	Users with Viewer privileges cannot do anything with tasks.
View other's tasks	—	—	Yes	Yes	Yes	View tasks that have been assigned to other users.
Assign tasks	—	—	Yes	Yes	Yes	Add a task to a file, set a due date, and assign the task to a user.
Upload	—	—	Yes	Yes	Yes	Upload to a folder.
Edit	—	—	Yes	Yes	Yes	Edit files using the integrated mobile editor.
View/promote versions	—	—	Yes	Yes	Yes	See previous versions of the file and promote a previous version the latest version.
Delete versions	—	—	Yes	Yes	Yes	Delete a previous version of the file permanently.
View users	—	—	Yes	Yes	Yes	View the users and their roles in a folder.
Lock/unlock	—	—	Yes	Yes	Yes	Lock/Unlock a file so it cannot be edited.
Delete files	—	—	Yes	Yes	Yes	Delete a file; deleted files remain on the system for a set number of days before being permanently deleted.
Delete folders	—	—	—	Yes	Yes	Delete a folder; deleted folders remain on the system for a set number of days before being permanently deleted.

Table 1. User Roles and Access Privileges

Permission Control	Viewer	Downloader	Collaborator	Manager	Owner	Notes
Manage users	—	—	—	Yes	Yes	Add a user to a folder and set that user's role within the folder; remove a user from access to a folder.
Manage deleted files	—	—	—	Yes	Yes	Restore deleted files or remove deleted files permanently from the server.
Create nested folders	—	—	—	Yes	Yes	Create a nested folder under an existing folder.
Rename folders	—	—	—	Yes	Yes	Rename the folder or edit the folder description.
Permanently delete	—	—	—	Yes	Yes	Permanently remove an item from the system so that it may not be restored and so that it no longer uses storage quota.
Enable/disable sync	—	—	—	Yes	Yes	Enable and disable sync for a folder.
Delete/edit others' tasks	—	—	—	Yes	Yes	Remove or edit other users' tasks. The task creator can always delete or edit his own tasks. Deleting a task also deletes all replies to that comment.
Delete/edit others' comments	—	—	—	Yes	Yes	Remove or edit other users' comments. The comment creator can always delete or edit his own comments. Deleting a comment also deletes all replies to that comment.

Appendix B: Icons and Symbols

Table 1. kiteworks Icons and Descriptions

Icon	Description	Notes
	Actions	Opens a menu of actions you can perform on a file; refer to Manage Files.
	Add File/Folder	Reveals elements to add to the current folder (new folder, new file, upload from camera, etc.); refer to Create New.
	Adjust Panel Width	Drag the triangle to adjust the width of the blue panel.
	Circle Icon	Move Tray - for managing the locations of files and folders; refer to The Move Tray.
	Circled Checkmark	Indicates that the file is selected in the Move Tray.
	Comments	When a file is selected, tap this icon to see all of the comments associated with the file.
	Dark/Light Triangles	Indicates that the file has been edited on your device and not yet been uploaded. The file is out of sync.
	Downward Arrow	Indicates that the file is not local has not yet been downloaded to your device.
	Favorite	Marks the folders as Favorite, so it they are easily found again using the navigation menu.
	Favorites	Filters the list of folders to those folders and files that you have marked as Favorite.
	Folder	Changes to the collaboration view, for creating, adding, sharing, and viewing files and folders; refer to Collaboration View: Where You Work.

Table 1. **kite**works Icons and Descriptions

Icon	Description	Notes
	Folder	Shows a Folder that can be shared or have files and folders added to it.
	Help	Provides links to online help and User's Guides, as well as information and useful links.
	Information	Indicates an alert that a file did not upload or download as expected. Tap the icon for more information.
	Left Arrow	Navigates back in folder hierarchy.
	Light Square	Indicates that the file has been downloaded successfully to your device.
	Lock	Indicates that a user has locked the file or folder for edits and no one can upload a new version of the file until it is unlocked; refer to Locking Files.
	Manage People	Allows the user to add, delete, or change access for others to access the folder; refer to Manage People.
	Move Tray	Opens The Move Tray panel.
	Plus	Opens the Create New menu.
	Settings	Allows you to either sign off or edit your current user settings; refer to Settings.
	Shared Folders	Filters the list of folders to those folders that you have shared with other users.
	Show Navigation Bar	Shows the Navigation bar when the default view has the navigation bar hidden.
	Tasks	When a file is selected, tap this icon to see all of the tasks associated with the file.
	Three bars	When using The Move Tray, this button shows you the actions you can perform on the files when selecting the move/copy location.

Table 2. Enterprise Sources

Identifier	Description	Notes
	Box Connector	Icon indicates that the content source is from Box. **Note** End-users cannot add a new Box connector. To add a new Box connector, contact your Administrator.
	Documentum Content	Icon indicates that the content source is from Documentum.
	Dropbox	Icon indicates that the content source is from Dropbox.
	Google Drive Content	Icon indicates that the content source is a Google Drive. **Note** End-users cannot add a new Google Drive. To add a new Google Drive, contact your Administrator.
	Home Share	Icon indicates that the content source is the home directory of your operating system. To add your Home Directory, contact your Administrator.
	OpenText Content	Icon indicates that the content source is from OpenText.
	SharePoint or Microsoft OneDrive Content	Icon indicates that the content source is Microsoft OneDrive, SharePoint 2013, SharePoint Online, or SharePoint 2007 or 2010.
	Windows File Shares Content	Icon indicates that the content source is Windows File Shares/CIFS or Distributed File Systems (DFS).

Table 3. Integrated Mobile Editor Icons and Symbols

Icon	Description	Notes
	Accept annotation	When placing a freestyle line, you must tap this icon to affix the line to the PDF file.
	Add	Brings up a menu to add the following elements: • Annotation - Add highlighting, notes, freehand lines, and comments to the file • Shapes - Lines, shapes, and callouts (not currently supported) • Image - Images currently saved in your device (not currently supported) • Photo - Opens your camera to take a photo and place that photo directly into the document (not currently supported)
	Arrangement	Allows you to set the layers of objects in Microsoft PowerPoint Files.
	Bookmarks	Shows the bookmarks that currently exist in a PDF (Portable Document Format) file.
	Bookmarks: Add	Allows you to add bookmarks to a a PDF (Portable Document Format) file.

Table 3. Integrated Mobile Editor Icons and Symbols

Icon	Description	Notes
	Bookmarks: Delete	Allows you to delete bookmarks from the a PDF (Portable Document Format) file.
	Cut/Paste	Brings up a menu to perform the following functions: • Delete • Cut • Copy • Paste On PDF files, this function can be used only for deleting an annotation; this does not work for editing text on the file.
	File	Brings up a menu to perform the following functions: • Save • Save As (when possible) • Help - Brings up the Accellion FAQs
	Freehand line	Allows you to draw a freehand line in a PDF (Portable Document Format) file.
	Highlight	Highlights the selected text in a a PDF (Portable Document Format) file.
	Keyboard	Brings up the keyboard so you can type in the document.
	Line Color	Change the color and opacity of the line.
	Line Thickness	Adjust the thickness and opacity of the line.
	Line Type	Select solid, dotted, and other types of line styles.
	Note/Comments	Allows you to insert a comment on a PDF (Portable Document Format) file.
	Pages	Shows thumbnails of each page in a carousel format. You can pan left or right to select any page to view normally, or return to the previous one by tapping the Pages icon again.
	Reject annotation	To reject the freestyle line you may have placed, tap this icon to delete it.
	Shape Fill	Allows you to fill the shape with a color, and adjust the opacity of the fill.

Table 3. Integrated Mobile Editor Icons and Symbols

Icon	Description	Notes
	Undo/Redo	After making a change to your document, you can undo (and later re-do) the action (where possible).
	View	Brings up a menu to perform the following functions: • Reflow - Normally, pages are laid out as they would be printed. When you reflow the file, font sizes are scaled to be readable, images are scaled to be no bigger than the screen, and objects such as tables are laid out vertically rather than horizontally. • Find - Brings up a search dialog box.